

Bonus Chapter 7

Exploring Advanced Topics

In This Chapter

- ▶ Using promotional coupons
 - ▶ Downloading items
 - ▶ Using PayPal and Google Checkout
 - ▶ Setting up a Knowledge Base
 - ▶ Answering employee questions
-

NetSuite is chock full of features to enhance your Web site and assist both customers and employees. This chapter tells you how to make your site and the products you sell there more appealing — offer coupons, downloads, and a running shopping cart total on each checkout page. This chapter also describes resources you can provide to help your customers and your employees help themselves.



Keep your eyes on the Release Notes with every release and sign up for the NetSuite User Community site. New enhancements are always arriving, and other NetSuite users come up with great ideas!

Checking Things Out

Checkout includes lots of elements: promotions, coupons, and checkout options. Read all about it in the following sections.

Getting promotional URLs



Promotional URLs are a way to make short URLs for pages when you're running sales or promotions. *Promotional URLs* differ from descriptive URLs in that they're used only for linking and don't help with search engine optimization. After the link is followed, the URL snaps back to the original.

You can also use promotional URLs for the following:

- ✓ **Entirely new domains** that you may buy for special events. If you get a new domain, set it up first on the Domains page and select Promotional URL in the Hosted As column. For example, you can make

```
http://shopping.netsuite.com/app/site/site.nl/site.  
ACCT00000/mode.items/sc.5/.f.
```

look like this:

```
http://shopping.netsuite.com/fallsale
```

- ✓ **Passing discounts** through a link. If you set up a promotion code with a discount, you can add the promotion code parameter to the promotional URL. For more information about promotion codes, see Chapter 8.

To set up a promotional URL:

1. **From the Setup tab menu, choose Marketing**⇨**Promotional URLs**⇨**New**.

The Promotional URL page appears.

2. **In the Composite URL field, enter the base domain for this promo URL.**

The base domain must be set up on the Domains page at Setup⇨Web Site⇨Domains.

3. **In the Name field, enter the part of the URL to show just after the base domain.**

This appears automatically in the Composite URL field.

For example, if the name is clearance, the Composite URL field would read `http://www.example.com/clearance`.

4. **In the Page Type field, choose the type of page or form you're linking to.**

- **File Cabinet Item:** Link to a file stored in the File Cabinet. Make sure the file is marked as Available Without Login in order to share it via a URL.
- **Hosted Web Page:** Link to a file stored in your Live Hosting Files folder of the File Cabinet.
- **Knowledge Base Topic:** Link to a topic page if you use the Knowledge Base feature.
- **Online Case Form:** Link to an online case form that has the Enable Online check box selected.
- **Online Customer Form:** Link to an online customer form that has the Enable Online check box selected.
- **Web Site Category:** Link to one of the categories set up for this Web site.
- **Web Site Information Item:** Link to an information item that has the Display in Web Site check box selected.



- **Web Site Item:** Link to an item that has the Display in Web Site check box selected.
- **Web Site Tab:** Link to one of the tabs set up for this Web site.

This choice determines your choices in the Page field.

- 5. In the Page field, choose the page or form you are linking to.**
- 6. (Optional) In the Additional Parameters field, add tags.**

These tags pass default information through a form or pass discounts (using a promotion code parameter) to your store checkout. String parameters together with the & sign to add multiple parameters to a URL. For example, you can enter `category=wholesale&partner=ABC` Company when linking to an online customer form. When the customer record is created, the category is automatically saved as wholesale with partner ABC Company. Here are some of the available parameters for use with promotional URLs:

- Contact First Name: `firstname`
- Currency: `currency`
- Promotion Code: `promocode`
- Unsubscribe to E-mail Campaigns: `unsubscribe`
- Web Address: `url`

- 7. Click the Save button.**

You can now test your promotional URL, market the URL, or link to it from your other Web site pages.

Offering promotional coupons

You can offer promotion codes as coupons for orders and for individual items to help draw sales or to promote or reduce inventory for a certain item. Most of the time, you'll offer discounts or free shipping with promotion codes, but you can also create promotion codes without discounts to associate with online forms, campaigns, or partners for tracking purposes.

Here are a few ways to use promotion codes:

- ✔ Offer customers a percentage or flat amount discount on a phone or Web site order
- ✔ Offer customers associated with or brought in by a certain partner a percentage or flat amount discount on an order
- ✔ Offer customers a code for a percentage or flat amount discount on a certain item or items
- ✔ Attach a code for free shipping on orders over a certain amount

Attach a promotion code with no discount to a URL linked in a campaign e-mail or an online form to track the success of the e-mail in driving traffic to the site.

If you want to offer a discount with a promotion code to make it a coupon code, an Accountant or someone with similar permissions must create a discount item in NetSuite. (A discount item is not really an *item* per se; it's a line item on the sales order that calculates a discount.) Discount items set the discount rate in a percentage or flat rate.



Creating discount items

Creating a discount item is necessary only to discount an item; you don't have to set up free shipping coupons.

Administrators can create discount items this way:

- 1. From the Accounting tab menu choose Lists⇨Accounting⇨Items⇨New.**
- 2. Click the Discount link on the Item Type page.**

The Discount screen appears.

- 3. Enter a name for the discount in the Item Name/Number field.**
This should be descriptive of the discount rate, such as *25% Off*.
- 4. Select an account from the Account drop-down list.**
- 5. Enter a percentage or flat discount amount in the Rate field.**

Setting up promotion codes

Before you can create a promotion code, the Promotion Codes feature must be enabled by your Administrator. From the Setup tab menu she would choose Company⇨Enable Features. Select the Promotion Codes check box on the Transactions tab to enable promotion codes.

To set up a promotion code:

- 1. From the Campaigns tab menu choose Marketing⇨Promotion Codes⇨New.**
The Promotion Code page appears.
- 2. In the Promotion Code field, enter the code that customers can enter.**

For example, this code can look similar to *SPRNGSALE20*. You don't want people to be able to guess it easily, or you'll be giving many more discounts than you planned!

- 3. To offer a discount with this promotion code, select the discount item you created in the Discount drop-down list field.**

The rate associated with the discount item shows in the Rate field, but you can edit this rate if needed.



4. **Choose one option from the Apply Discount To drop-down list:**
 - **First sale only**
 - **All sales**
5. **To offer free shipping with this code, select the shipping method that should become free when this code is applied at checkout.**

Note that you can set a minimum order amount (in Step 8) for offers like “Free UPS Ground Shipping on orders over \$50.”

6. **In the Start Date and End Date fields, enter the date range when this code can be used.**

Be sure to tell your customers the expiration date if you set an end date.

7. **Select the Available to All Customers check box if every customer can use this code.**

Clear this check box to limit the code to only those customers associated with the partners you select on the Partners tab. Customers are associated with partners when the partner is selected on the customer record.

8. **Choose the Minimum Order Amount tab.**

9. **In the Minimum Order Amount field, enter the minimum pre-tax amount required for an order before the promotion code will work.**

If you use the Multiple Currencies feature, you can enter an amount for each currency on the Minimum Order Amount tab in the Minimum Order Amount column.

10. **On the Items tab, you can select the items that this promotion code applies to.**

If you select no items, the code applies to all items you offer. If you check the Exclude Items box, the code applies to all items *except* those you select and add on the Items tab.

11. **On the Partners tab, choose partners that should be credited for the sale when this code is used.**

12. **Click the Save button.**

This promotion code is now available for use on transactions. If you added a discount item to the promotion code and the transaction meets the criteria of the code, such as the correct items or partner, the discount is automatically applied to the order. Promotion codes can be entered internally, in the customer center, or by using the Coupon Code field during checkout in a NetSuite-generated Web site.

You can add promotion codes to URLs to give customers a discount when they click a link to your NetSuite Web site. This is especially useful when offering discounts through e-mail marketing campaigns. When customers click the link in the e-mail, the promotion code is applied; the discount, if any, is taken off the total, as shown in Figure BC-1.



Passing promotion code discounts in this way requires having an administrator set a preference. Your Administrator should follow these steps:

1. From the Setup tab menu choose Web Site → Set Up Web Site.
2. Select the Pass URL Promotion Code to Checkout check box on the Shopping tab.

The screenshot shows the 'Review and Submit Your Order' page. A coupon code 'SPRNGSALE20' is applied, resulting in a discount of \$171.20. The final total is \$768.00. The page includes navigation tabs, a cart summary, shipping and billing addresses, shipping and payment methods, and a table of items.

Item	Qty	Rate	Amount
HP_xw3100	1	\$856.00	\$856.00
Shipping			\$12.58
Tax			\$70.62
Discount			(\$171.20)
Total			\$768.00

Figure BC-1:
The coupon code is automatically applied when customers click a link to get a discount.



You can add specify a promotion code in a link using the following format: `http://www.yourstore.com/item&promocode=YourPromotionCode`. Using SPRNGSALE20 as an example, the URL would look like this: `http://www.yourstore.com/item&promocode=SPRNGSALE20`.

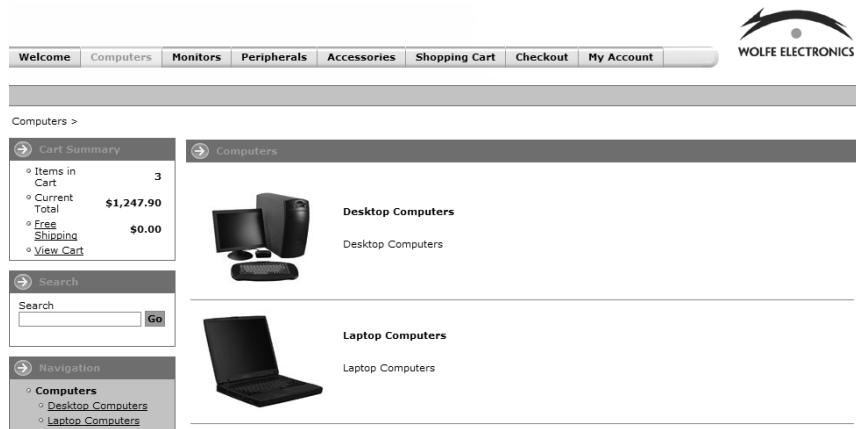
Cart preview and shipping estimator

The *cart summary* is a small box on the side of your site (the exact position depends on your theme) that shows the number of items in the cart with a running total of the order. See Figure BC-2.



Showing the shopping cart summary on all pages of your Web site is a good way to avoid shopping cart abandonment.

Figure BC-2:
The shopping cart summary with shipping estimator.



Additionally, you can show a shipping cost estimate in your shopping cart and shopping cart summary. This helps customers see the order total and prevents any surprises during checkout. The shipping estimator automatically calculates the shipping cost for the order based on the least expensive shipping method.

To show the shopping cart summary and the shipping estimator:

1. **From the Setup tab menu, choose Web Site⇒Set Up Web Site.**
The Web Site Setup page appears.
2. **Click the Appearance tab.**
3. **In the Shopping Cart section, select the Show Cart Summary check box.**
4. **Check the Show Shipping Estimator in Cart box.**
This reveals a shipping total in both the cart summary and the shopping cart page.
5. **Click the Save button.**

Getting Downloadable Items

You can offer downloadable files in your site either for purchase or for free. You may want to offer mp3 files, product user manuals, or software trials.



Offering items for download

Offering downloadable items requires the Electronic File Download add-on.

To offer downloadable items in your site ask an administrator to take these steps:

1. Choose Setup⇨Company⇨Enable Features.

This turns on the Sell Downloadable Files feature, which is available only if you bought the Electronic File Download add-on.

2. On the Enable Features page, click the Items & Inventory tab.

3. In the Items section, select the Sell Downloadable Items check box.

4. Click the Save button.

Adding a downloadable item

To add a downloadable item, follow these steps:

1. From the Lists tab menu choose Web Site⇨Items⇨New.

2. On the New Item page, click the Download Item link.

The Download Item record appears.

3. Type in the Item Name/Number field.

4. Type a description in the Display Name/Code field.

Select or enter any other information as needed.

5. Select the Display in Web Site check box.

6. On the Basic tab, click the Download Item field double arrow.

7. Click List.

A pop-up window appears.

8. Select the file to be downloaded.

9. Click the Add button.

You can choose files stored in the File Cabinet (available from the Home tab menu) here. To upload a file in a pop-up, click the double arrow and select New.



Downloadable items are charged by item record. To charge for each file, you must create a download item record for each file. To charge a set rate for a group of files, as you might for an album of songs, create a download item record for the group and add each file.

- 10. Enter a number in the Number of Allowed Downloads field.**
- 11. Enter a number in the Days Before Expiration field.**
- 12. Select the Immediate Download check box.**

If you deselect this check box, the item is available in the Customer Center or My Account page after payment is cleared.
- 13. (Optional) To charge for the download, click the Pricing tab and type the charge in the Online Price field.**
- 14. On the Store tab, select images for this item.**
- 15. From the Site Category drop-down list, select the category where the item should display online.**
- 16. Click Save.**

Your item is now available for download in your site. When site visitors buy or fill out a form for a download, the download becomes available on the customer's My Account page in your site. Customers must be registered and logged in to access the download on the My Account page.

Requiring registration



We recommend requiring registration when selling downloadable items. Otherwise, customers purchasing downloads can only access them just after purchasing them or via the link in the confirmation e-mail. Requiring registration simply means that customers must register their information with a login and password to buy something on your site.

To require registration, follow along:

- 1. From the Setup tab menu choose Web Site⇨Set Up Web Site.**
- 2. Click the Shopping tab.**

3. From the Customer Registration drop-down list, choose Required.

The list is in the Registration Page area. With registration, customers can access download files at any time from the Customer Center or from the My Account tab of your Web site.

4. Click the Save button.

Creating an online customer form

You can also offer free downloads to collect lead information. For example, you may let site visitors download a software trial when they submit contact information. The information is used to create a lead record.

To do this, create an online customer form:

1. From the Setup tab menu choose Other Setup⇨Marketing⇨Online Customer Forms⇨New.

2. Click the Default Form Template link.

For more information on creating online forms, see Bonus Chapter 2.

3. From the Lists tab menu choose Web Site⇨Publish Forms⇨New.

4. Click the File Download with Online Form link.

5. Type a name for the form in the Name field.

6. To attach the file to download, click the plus sign and browse to it.

7. Enter descriptions in the Brief Form Description, Detailed Form Description, and Featured Description fields.

8. Click Save.

Befriending PayPal and Google Checkout

PayPal and Google Checkout make paying for your products even easier for customers.

PayPal Integration

Accepting PayPal as payment and adding PayPal Express Checkout to your site allows customers to quickly pay for orders with their PayPal accounts. PayPal Express Checkout can save customers from re-entering their address and credit card information.

To offer PayPal as a payment method, you need to do the following:

- ✓ Enable the PayPal Integration feature.
- ✓ Set up an account with PayPal.
- ✓ Complete the PayPal Processing page.

Enable the PayPal Integration feature

To enable the PayPal Integration feature, administrators must set up an account with PayPal (at www.paypal.com), enable the feature, and complete the PayPal Processing page as described in the following section.

1. Choose Setup → Company → Enable Features.

The Enable Features page appears.

2. On the Transactions tab, select the PayPal Integration check box.

3. Click Save.

Set up PayPal as payment

To set up PayPal as a payment method, administrators should do this:

1. From the Setup tab menu, choose Accounting → PayPal Processing.

The Payment Method page for PayPal appears, as shown in Figure BC-3.

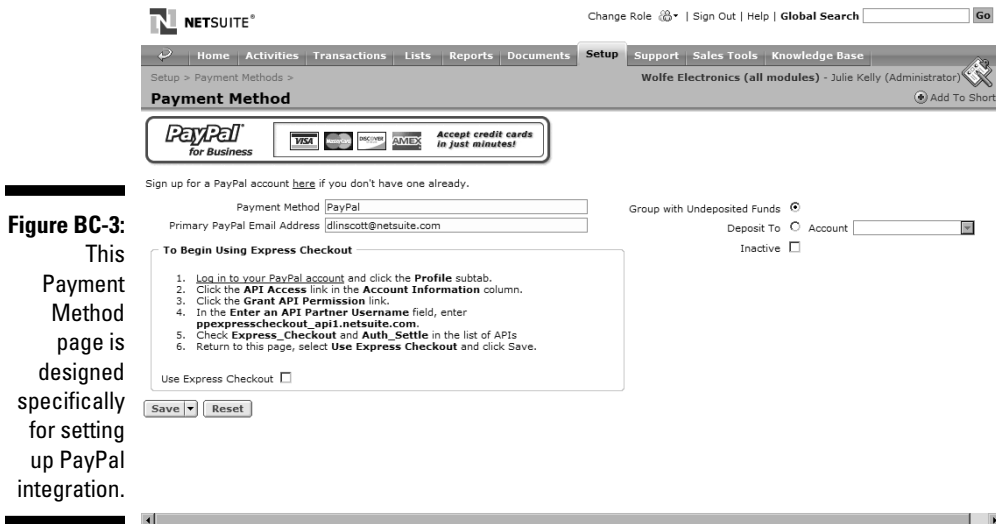


Figure BC-3:
This Payment Method page is designed specifically for setting up PayPal integration.

2. In the Email Address field, enter the main address associated with your PayPal account.

This is the e-mail address you log in to PayPal with and the account where you payments. If you use PayPal Express Checkout, this account works like a merchant account with a credit card processor.

3. Choose depending on how this income should be accounted for:

- **Group with Undeposited Funds**
- **Deposit To** (and then select the account)

4. If you're not offering PayPal Express Checkout, click Save. Otherwise, keep following along.

To offer PayPal Express Checkout, follow the instructions onscreen to set up your PayPal account.

These instructions contain information specific to your account that allows you to link your NetSuite and PayPal accounts. The link is verified when you save this page. If you're following the steps in a separate page, you may need to refresh this page before saving.

5. Select the Use PayPal Express Checkout check box.

6. Now click Save.

Buttons now appear on your checkout's Login/Register and Address pages. When customers click the PayPal button, they're sent to PayPal's site for payment and address verification; then they're brought back to your Review and Submit page, where they can enter gift certificate or coupon codes. The final amount is processed when the order is submitted.

Google Checkout

If you have a Google merchant account from <http://checkout.google.com>, you can integrate your NetSuite Web site with Google checkout. When you set up Google checkout integration in your NetSuite account, customers can click a Google Checkout button in the shopping cart to check out using their Google account profile, which usually has their saved credit card and address information.

Using Google checkout is beneficial because it

- ✓ Offers a payment guarantee to merchants
- ✓ Offers fraud protection to merchants
- ✓ Can result in higher sales when your advertisements feature the Google checkout badge

Enable Google checkout

To use Google checkout, you must enable the feature.

- 1. From the Setup tab menu, choose Company⇨Enable Features⇨Web Presence.**
- 2. Choose the Google Checkout check box.**
- 3. Click the Save button.**

Register your Google Checkout

Once the feature is enabled, you must register your Google Checkout account with NetSuite.

- 1. From the Setup tab menu, choose Web Site⇨Google Checkout Accounts⇨New.**

The Google Checkout Account page appears.

- 2. Enter the name of the account in the Account Name field.**
- 3. Enter the Google Merchant ID and Google Merchant Key in the respective fields.**

Google assigns the merchant ID and merchant key.

- 4. Click Submit.**

Activate Google Checkout

To activate a Google checkout account that you've registered with NetSuite, follow along:

- 1. From the Setup tab menu, choose Web Site⇨Set Up Web Site.**
- 2. Choose the Setup tab.**
- 3. Select the account name from the Google Checkout Account drop-down list.**
- 4. Click Save.**

Set up default shipping method for Google

Google Checkout integrates with your NetSuite shipping methods, including UPS, FedEx, and USPS real-time rate methods. However, if Google can't establish a real-time rate for a customer, you need to give it a default shipping method to use instead that doesn't require Google to come up with a real-time rate.



1. From the Lists tab menu, choose Accounting⇨Shipping Items.

Shipping Item is NetSuite parlance for shipping method.

2. Click Edit next to each shipping method that has a real-time rate associated with it.

The Shipping Item page appears.

3. Click the Shipping Rate tab.

4. Select a shipping method that doesn't use a real-time rate from the Default Shipping Method drop-down list.

Do so for each shipping item that's integrated or uses a real-time rate. The option is on the Shipping Rate tab.

5. Click Save.

6. Repeat Steps 2–6 for each shipping item that uses a real-time rate.

Make items compliant with Google Checkout

The final step in setting up Google Checkout with NetSuite is to make your store items compliant with Google Checkout. Luckily, you can do a mass update.

Follow along to set all items showing in your store to be Google Checkout compliant:

1. From the Lists tab menu, choose Mass Update⇨Mass Updates.

2. Click General Updates to expand this section.

3. Under Items, click Inventory Item.

If you also sell other types of items, you will need to repeat these steps for each item type.

4. On the Criteria tab, select Display in Web in the Filters column.

A pop-up window asks if this should display in the Web site (with radio buttons for Either, No, and Yes).

5. Select the Yes radio button.

6. Choose the Mass Update Fields tab.

7. Select the check box in the Apply column to the left of Google Compliant.

8. Select the check box in the Value column to the right of Google Compliant.
9. Click the Preview button.
10. Review the items that will be updated, and click the Perform Update button.

When customers check out from your site using Google Checkout, a sales order is created in your account using the order form you set at Setup⇨Web Site⇨Google Checkout Accounts. On this order's Payment tab, special Google Checkout fields reveal the order status. Once the Google Order Financial State field shows CHARGEABLE, the order is ready for processing and is available under Transactions⇨Sales⇨Fulfill Orders.



When you fulfill an order, you can click the Bill button on the fulfillment to charge for the order with a cash sale.

Favicons

Favicons are small logos that appear with page titles in browser windows. In Firefox, Internet Explorer, and Chrome, these icons show on the tabs for each page and show when you bookmark a page or add it as a favorite.

A couple things to know before you charge ahead:

- ✓ Favicons must have the file extension .ico. You will need to create and save your logo as favicon.ico. Numerous online tools can help you do this quickly.
- ✓ Enable both the Advanced Site Customization and Host HTML Files features to use favicons.

To use a favicon with a NetSuite site:

1. From the Setup tab menu, choose Web Site⇨Web Site⇨Web Site Hosting Files.

This opens the Web Site Hosting Files of your File Cabinet, which is also available from the Documents tab.

2. Click Live Hosting Files to open the folder.
Keep going to subfolders until you reach the root directory for your site.
3. Click the Add File button.
4. Choose the .ico file from your hard drive.
5. From the Setup tab menu, choose Web Site⇨Themes.
6. Click the Edit or Customize link next to the theme you use for your site.
7. Type the following in the Addition to <head> field:

```
<link href="/favicon.ico" rel="shortcut icon" type="image/x-icon">
```

Anticipating Customer and Employee Questions

Both customers and employees need a little more help at different times. You can offer a knowledge base to your customers and provide a help desk to your employees so that they can find answers to their questions on their own.

Scoring with a knowledge base

A thoughtfully set up and complete knowledge base can come in handy and makes good business sense. When it's after hours or there are long hold times, customers can search your knowledge base to see whether someone else has already asked the same question and take action — without ever having to contact support.



Your *knowledge base* is basically a collection of solutions to common problems or questions. These solutions are organized under topics. If you operate a Web site through NetSuite, the topics act like categories, and the solutions are like items.

You can create more than one knowledge base in NetSuite, but most likely, you'll want to create just one. You can also make your knowledge base accessible only to support reps or publish it to your Web site for anyone to access. You can also publish your knowledge base as a tab in the Customer Center so that only registered customers (not regular Web site visitors) can see it.

Before you can do anything, however, you must first enable the Knowledge Base feature:

- 1. From the Setup tab menu, choose Company → Enable Features.**
- 2. On the CRM tab, select the Knowledge Base check box.**
- 3. Click the Save button.**

Choosing your topics

First, you build the outline of the knowledge base by deciding on topics. For example, the support manager of a furniture store may have such topics as Delivery, Assembly, Patterns, Returns, Repair, and Basic Care. You can also have subtopics. For example, under Assembly, there may be subtopics of Chairs, Sofas, and Recliners.

Administrators add topic records, though, so you may need to do some baking if you want a lot of topics created.

To create a topic record:

1. From the Lists tab menu choose Support→Topics→New.

The New Topic page appears.

2. In the Title field, type the name of the topic.
3. If this topic should be nested under another topic, select the parent topic in the Subtopic Of drop-down list.

When your knowledge base is published, subtopics appear indented under parent topics.



First make a topic named **Knowledge Base** or something very generic to serve as your top-level topic. All other topics you create should be placed under this topic. This will allow you to publish your entire knowledge base at once. Alternatively, you can make all topics subtopics of the default Unassigned topic. You can then rename the Unassigned topic before publishing the knowledge base.

4. In the Brief Description field, enter a sentence-long summary of this topic.

This brief description shows with the topic when viewing a list of topics, as shown in Figure BC-4.

5. In the Detailed Description field, enter a longer description of what this topic includes.

This detailed description shows when you click the topic name above the included solutions. You can enter CRMSDK tags in this field, and if you click the HTML Source Code link, you can also enter JavaScript.

6. (Optional) In the Memo field, add user notes about this topic.

Those notes may include why it was created.

7. Click the Save button.

Solution: Applying Manufacturer's Warranty

Edit Back More Actions

Code 1 Status **Approved**

Title **Applying Manufacturer's Warranty** Display Online

Abstract **Wolfe Electronics stands behind the warranties provided by the manufacturer's we work with.** Creation Date/Time **14.8.2010 4:16 am**

Preview Html Last Modified Date/Time **14.8.2010 4:17 am**

Assigned To Inactive

Details Topics Related Solutions Cases Notes

Description **To enable our customers to purchase with confidence, by applying any limited warranty on a manufacturer's product when purchased through Wolfe Electronics. To receive a copy of the manufacturer's limited warranty, please send an email to manuwarranty@wolfe.com.**

Preview Html

Edit Back More Actions

Figure BC-4:
Topics
in a list
with brief
descrip-
tions.

After saving the topic, you can open the topic from the list (choose Lists⇨Support⇨Topics, and click the name of a topic) and see new tabs on the record:

- ✓ **Subtopics:** Add or change the order of any subtopics in a separate window by clicking the New button.
- ✓ **Solutions:** See which solutions are sorted under this topic, re-order them, or create new ones to show under this topic in a separate window by clicking the New button.
- ✓ **Notes:** View and add notes on the User Notes tab and click the System Notes tab to see past changes to this record.
- ✓ **Publish:** See where this topic and its associated solutions have been published.

If you're not part of the solution . . .

Solutions are similar to Help topics for your customers. They can include standard responses to frequently asked questions, steps for assembling or repairing something, or quick tips on using your products or services.

To create a solution:

- 1. From the Cases tab menu choose Customer Service⇨Solutions⇨New.**

The New Solution page appears.

As discussed in the previous section, you can also create new solutions from the Solutions tab of topic records.

- 2. (Optional) In the Code field, enter a special code for this solution.**

If you use Auto-Generated Numbering for solutions, this code is generated after you save the solution to prevent duplication.

- 3. In the Title field, type a descriptive name for the solution.**

You can enter 256 characters in this field. It's important to make this as descriptive as possible because titles can be searched in the knowledge base, and titles are what you use when attaching solutions to topics or cases.

- 4. In the Abstract field, enter a brief description of what this solution is about.**

This description shows with for the solution in Solutions lists, and helps the reader know whether this is the main solution for their problem or question.

- 5. In the Assigned To drop-down list, you can select a person that is responsible for keeping this content up to date or responsible for approving the solution for publishing.**



Being assigned to a solution simply means that you can filter the Solutions list to view only solutions that you need to manage.

6. Choose from the Status drop-down list:

- **Approved**
- **Unapproved**



Solutions must be approved to be published online or attached to support cases, even if the Display Online check box is selected. Typically, one other person, such as a support manager, should review the solution and select Approved from the Status drop-down list after the solution is created. You can assign the solution to this person to let her know it needs to be approved.

7. Select the Display Online check box if this solution should be published.

The solution still must be approved and attached to a published topic before it's visible in the knowledge base. You can deselect this check box to keep the solution internal.

8. On the Details tab, enter the text for the solution in the Description field.

If you use the HTML source code view of this field, you can enter HTML and JavaScript. You can use CRMSDK tags in both the source code and the rich text formatting views. You can enter a million characters in this field, so don't worry about getting text cut off!

9. (Optional) Add the solution to the appropriate topics on the Topics tab by selecting from the Topics drop-down list.

10. (Optional) Select the Related Solutions tab to link this solution with similar solutions. You enter the code or title of the related solutions in the Code/Title field.

11. Click the Save button.

Publish your knowledge base when the basic topics and solutions are set up (you can add to the knowledge base anytime). If you haven't done so, you should create the tab or category where your knowledge base will be. For more information on creating tabs and categories, see Chapter 15.

To publish your knowledge base, Administrators can follow these steps:

- 1. From the Lists tab menu, choose Support⇨Knowledge Base⇨New.**
- 2. From the Topic drop-down list, select the top-level topic to publish.**

All subtopics and attached solutions that are approved and set to display online are included.

3. Choose an option from the **Publish To** drop-down list (either a **Web site** tab name or **Knowledge Base**).
4. Select the **Display in Web Site** check box if you're publishing to your **Web site**.
5. (Optional) On the **Audience** tab, specify who can see the knowledge base by selecting roles, names, and groups of people.
6. Click the **Save** button.

Helping employees who help desk themselves

Employees need extra help at times, too. Even in the most technologically advanced companies, sometimes the best and brightest gather in a conference room and can't figure out how to use the phone for their conference call. Thankfully, that's why they have an IT team or Help desk.

Like the support team, the internal help desk team needs a helpful way to manage cases and track progress. NetSuite's Help Desk feature turns regular support cases into internal cases and gives employees a way to submit cases online through the Employee Center.



Enable the Help Desk feature on the CRM tab: From the Setup tab menu, choose **Company** ⇨ **Enable Features**.

A Help Desk check box is added to case records when you enable the feature. If a help desk employee gets a call or an e-mail from another employee, the employee can enter a case record and select the Help Desk check box to mark the case as internal.



All cases entered through the Employee Center automatically have the Help Desk check box selected. This keeps it out of the regular support case queue.

Even better, you can set up case rules and territories to automatically route help desk cases from employees to the correct IT person. For example, by setting up a case rule based on the Help Desk check box, you set up additional more detailed rules based on the subject or employee submitting the case to route them to the person best able to answer the case. In this case, you'd want the case to match both rules so that it's both an internal case (for the help desk) and a case about a particular subject (so you can route it automatically to the person who knows most about that topic).