



Hubcase for NetSuite

Installation and Configuration Guide

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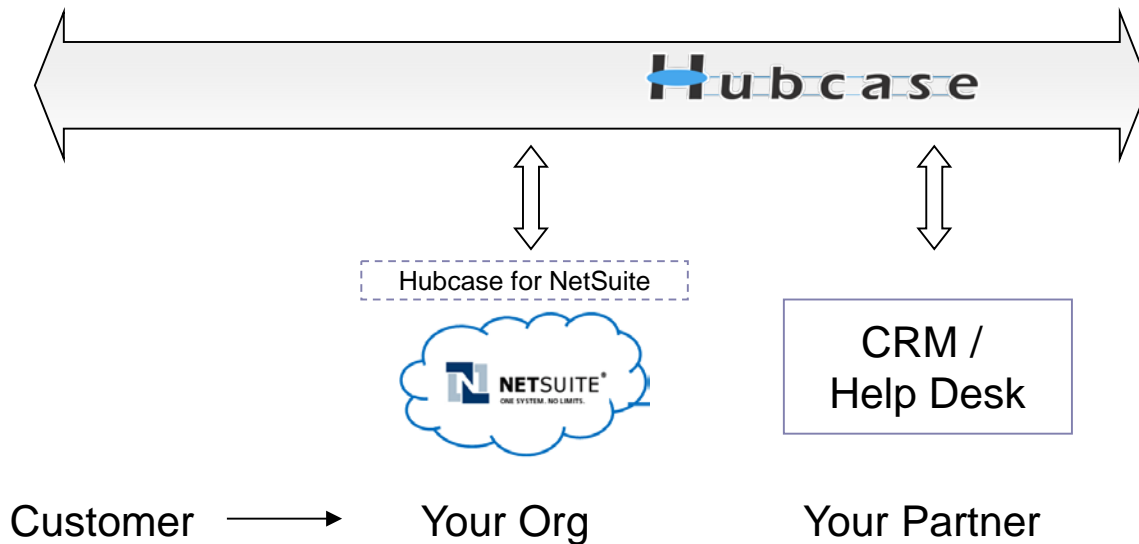
If you have any questions, please email support@hubcase.com

Note: this document is intended for system administrator, and not for end users.

1. Overview

“Hubcase for NetSuite” is a NetSuite SuiteApp or bundle that adds B2B escalation capability to your support cases under your NetSuite account.

Specifically, the bundle adds a “B2B” subtab on your Cases form if permitted by user role, and the subtab serves as the user interface to facilitate B2B communication via Hubcase. It does not replace or alter any of your existing NetSuite behavior.



As illustrated above. Hubcase allows your NetSuite instance to interact with a partner’s system to escalate support cases to each other.

In other word, “Hubcase for NetSuite” bundle is a plug-in or adapter that connects your NetSuite to Hubcase. This Guide helps you accomplish both:

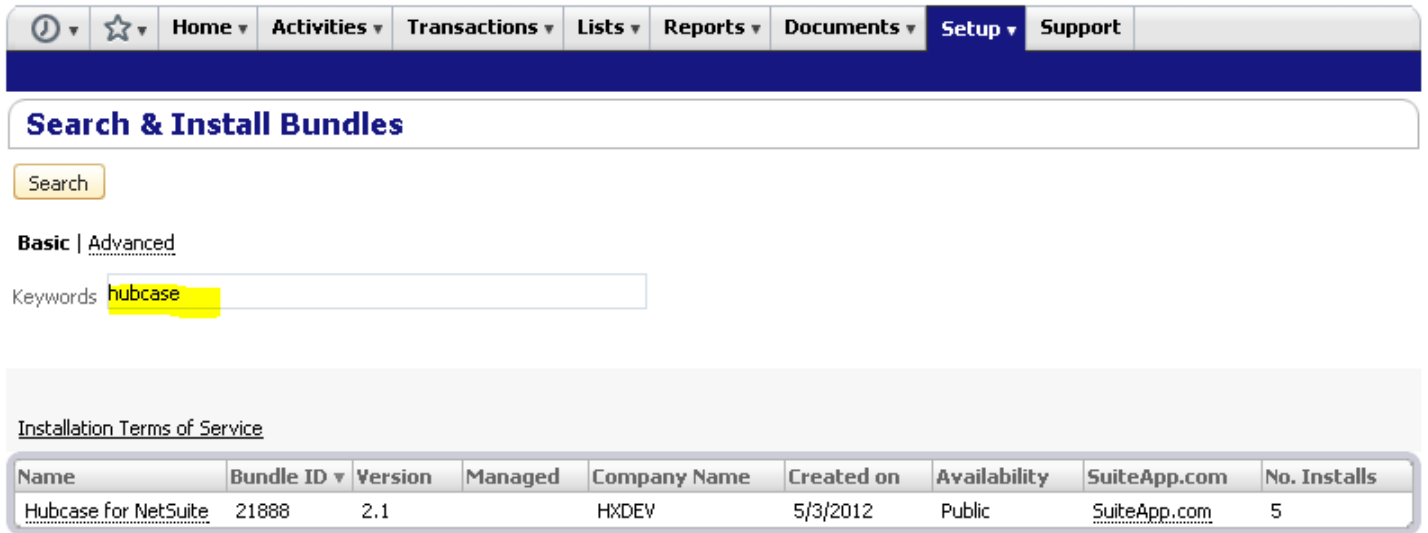
- Install and configure Hubcase for NetSuite (the plug-in, bundle or adapter)
- Setup Hubcase membership for your organization, and configure interaction with the plug-in

Please note that the installation and configuration only need to be done once by administrator, and only occasional maintenance is needed. Additional information can be found at http://www.hubcase.com/exchange_netsuite.html

2. Install “Hubcase for NetSuite” bundle / SuiteApp

Login your NetSuite account as Administrator.

- Navigate to Setup > Customization > Install Bundle
- type “Hubcase” in the keyword field, the search
- Click on “Hubcase for NetSuite” in the search result



The screenshot shows the NetSuite interface. At the top is a navigation bar with tabs: Home, Activities, Transactions, Lists, Reports, Documents, Setup, and Support. Below this is a section titled "Search & Install Bundles". There is a search button labeled "Search" and a link for "Basic | Advanced". The "Keywords" field contains the text "hubcase". Below the search results, there is a link for "Installation Terms of Service". A table displays the search results for the "Hubcase for NetSuite" bundle.

| Name | Bundle ID | Version | Managed | Company Name | Created on | Availability | SuiteApp.com | No. Installs |
|--------------------------------------|-----------|---------|---------|--------------|------------|--------------|------------------------------|--------------|
| Hubcase for NetSuite | 21888 | 2.1 | | HXDEV | 5/3/2012 | Public | SuiteApp.com | 5 |

Click on "Install" on the following screen

Navigation: Home ▾ Activities ▾ Transactions ▾ Lists ▾ Reports ▾ Documents ▾ Setup ▾ Support

Bundle: List

Bundle Details: Hubcase for NetSuite

Back | **Install**

| | | | |
|-----------------|--------------------------|---------------|---|
| Name | Hubcase for NetSuite | No. Installs | 5 |
| ID | 21888 | Product | CRM, CRM+, NetSuite, NetSuite OneWorld |
| Copied From | | Vertical | Agriculture, Computer Software, Computer Software Web-based, Construction & Contracting, Distribution & Wholesale, eCommerce, Education, Energy / Utilities, Finance & Insurance, Government, IT Developer / Reseller / VAR, Manufacturing, Nonprofit, Real Estate, Restaurant & Hospitality, Retail, Services : Accounting, Services : Advertising & Marketing Services, Services : Computer & IT Services, Services : Consulting, Services : Engineering, Architecture & Design, Services : Healthcare Services, Services : Legal, Services : Media/Publishing, Services : Other, Services : Personal Services, Services : Professional Services, Services : Telecommunications, Services : Transportation Services |
| Version | 2.1 | Languages | English (International), English (U.S.) |
| Company | HXDEV | Availability | Public |
| Managed | <input type="checkbox"/> | Documentation | Hubcase for NetSuite Installation and Configuration Guide |
| Available Since | 8/17/2012 | | |



Navigation: Overview | **Components** | SuiteApp Info



Abstract Collaborate with your partners and vendors to solve your customer support cases. Escalate a support case from within your own NetSuite to your partner or vendor using another instance of NetSuite, Salesforce etc. The result is dramatically improved customer satisfaction and productivity. How do you escalate a case to your vendor or partner today?

Click “Install Bundle” on the next screen.

Note that there is one User Event script `hx_case_customize_ue`, the order of execution does not matter as it this App does not alter standard case record, so there is no potential conflict with other apps.

Record type `hx_escalation` is a child table of standard cases and it saves B2B interactions about a case. `hx_preference` has the parameters used to communicate with Hubcase server.

It may take a while for the installation process to complete. “Refresh” until you see status is check like the following:

| Installed Bundles | | | | | | | | | |
|---|---|-----------|---------|---------|---|-------------------------------|--------|----------------------|----------------|
| Action | Name ▲ | Bundle ID | Version | Managed | Abstract | Documentation | Status | Owner | Installed From |
|  |  | 21888 | 2.1 | No | Collaborate with your partners and vendors to | Documentation | ✓ | HXDEV (TSTDRV927313) | Repository |

You have completed the Bundle installation!

It's a good idea to keep your NetSuite window / tab open while doing the remaining steps as you will need to reference information from NetSuite.

3. Setup and configure your Hubcase membership

3.1. Sign up and activate Hubcase membership for you organization

To setup your Hubcase membership for your organization, open a new browser tab / window and point to:

<https://www.hubcase.com/index.php/webquicksignup/exchange>

Please enter appropriate information for your company to create a Hubcase account:

Firefox

Installed Bundles - NetSuite (My Demo Or... x Organization Setup

https://www.hubcase.com/index.php/webquicksignup/exchange

Google

Hubcase

Organization Setup

You Organization Name: *

You Organization Access Site (enter lowercase letters and numbers only, no space): *

Email: *

Security question, please solve: *

| | | | |
|-------|------|-------|--------|
| 200 | 0 | 100 | 1000 |
| 10000 | 1000 | 100 | 10000 |
| 100 | 1000 | 10000 | 100000 |

I have read and agreed to the Master Service Agreement

Sign Up

You will receive an activation email after clicking "Sign Up". Please follow the link provided in the email to activate your account.

The screenshot shows a Firefox browser window with the following details:

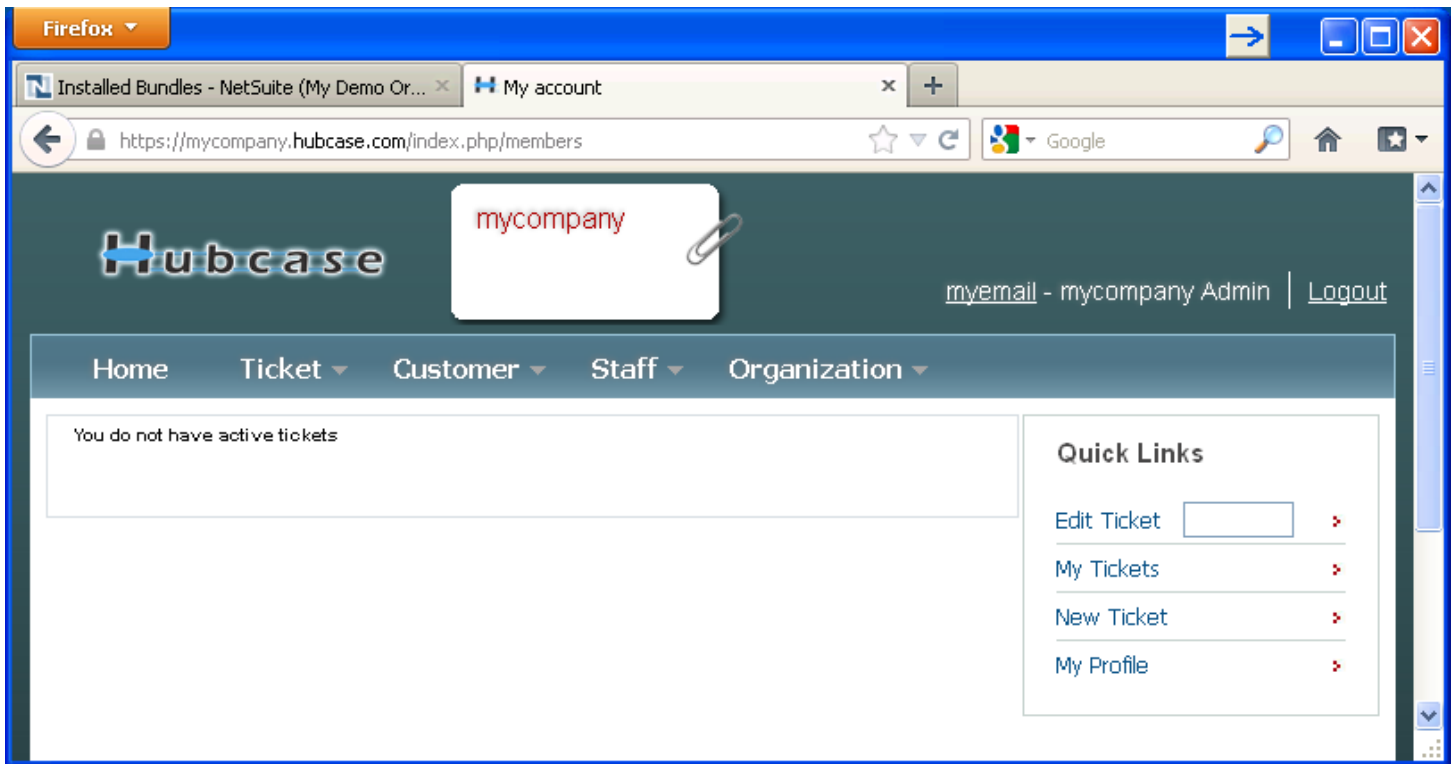
- Browser: Firefox
- Address Bar: https://mycompany.hubcase.com/index.php/webquicksignup/pc_websetup_activ
- Page Title: Organization Signup Activation
- Hubcase Logo: mycompany

The form fields and their values are:

- You Organization Name:** mycompany
- You Organization Access Site:** <https://mycompany.hubcase.com>
You will be accessing your hubcase using the above.
- Your user name is your email, please set up your password here**
- Password:** [Redacted]
- Re-type Password:** [Redacted]
- Your First Name:** John
- Your Last Name:** Doe
- Your Phone Number:** 555-1212
- The primary system: (for example, Salesforce, NetSuite, Oracle/Siebel, SAP, Remedy etc.)**
NetSuite

Activate

Upon "Activate", you will be logged in to the Hubcase portal as admin.

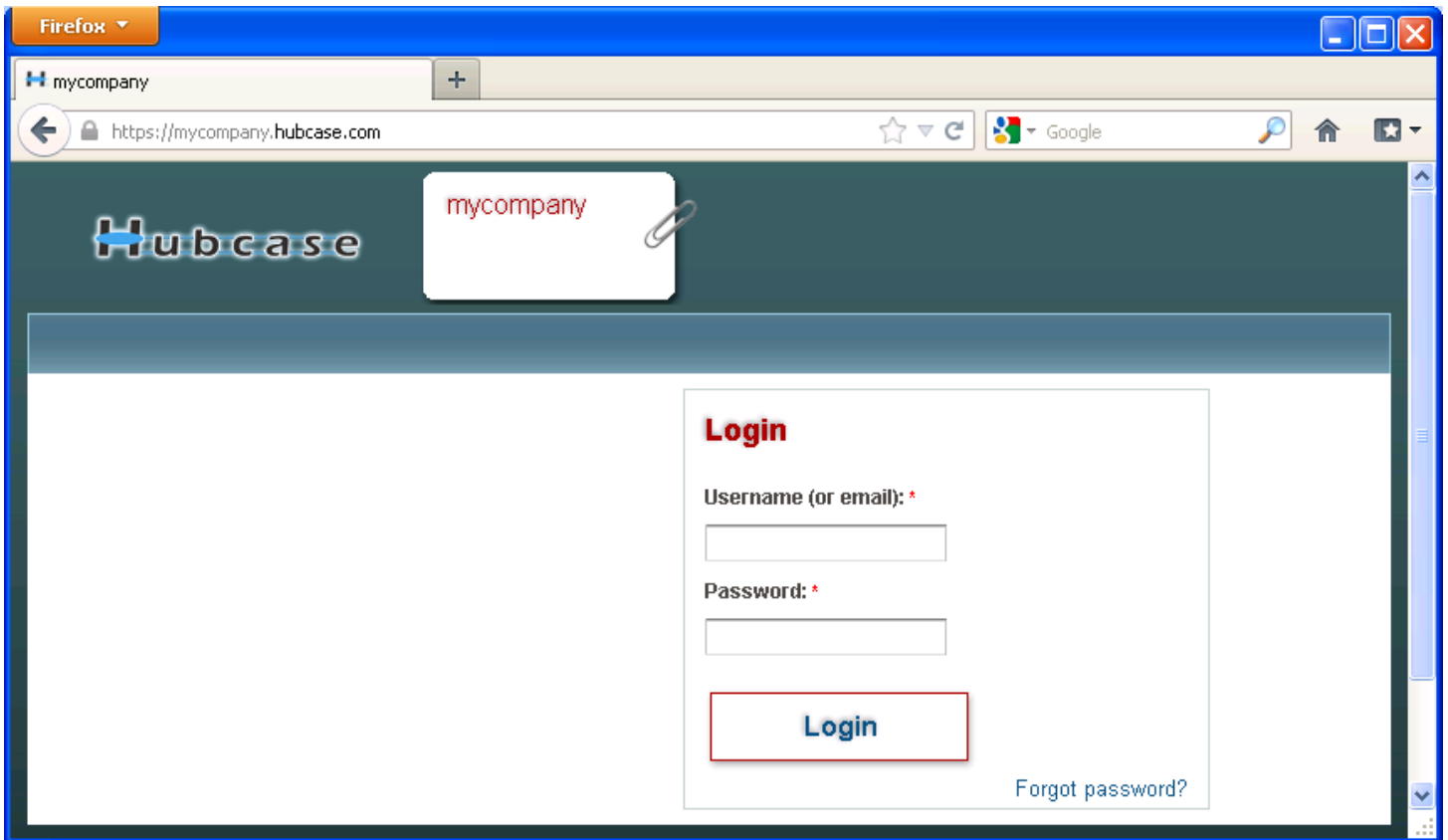


And the sign up and activation for Hubcase membership is now complete.

3.2. Login to your Hubcase portal account

Each organization has its own unique URL to login, if you set up your org as “mycompany”, your login URL should be:

- <https://mycompany.hubcase.com>
- Username is your email address



Contact support@hubcase.com if you any problems.

3.3. Setup B2B escalation partners

To setup your B2B escalation partners, you need to login to your Hubcase portal first, and navigate to "Organization > Partners" form as shown below:

Home Staff Organization

Search for partners below, you may **ADD** your own if you can't find them here

con Search

| <input type="checkbox"/> | NAME |
|-------------------------------------|----------------------|
| <input type="checkbox"/> | Consultants |
| <input checked="" type="checkbox"/> | Sconti |
| <input type="checkbox"/> | Universal Containers |

Invite

My partners

| ORG ID | NAME | Remove |
|--------------------------|-------------------------|--------|
| <input type="checkbox"/> | support Hubcase Support | |

Type at least 2 characters in the NAME field to Search the partner you are looking for. If your partner is already in the system, you can simply check the box and click on "Invite". Please at least add "NS Partner5" as your partners for test purpose. **The invited partner must also accept your invitation before it appears under your "My partners" list.** Make sure to confirm that under "Organization > Partners" menu.

If your partner is not yet a member of Hubcase, you can "ADD" them as seen in the screenshot. What will happen is, the partner contact will get an email notification and optionally activate the partner's Hubcase membership account.

Home Staff Organization

Search for partners below, you may **ADD** your own if you can't find them here

con Search

3.4. Configure Custom Fields

As a member of Hubcase, you can define up to 20 custom ticket fields and 20 B2B fields. The B2B custom fields will be presented to your partners when they need to escalate a case to your organization. Conversely, when you need to escalate a case to one of your partners, the partner’s custom fields will be presented for you to populate. Therefore, each partner will define its B2B custom fields for inbound escalation cases.

Navigate to Organization > Custom Fields and select the “Define Custom Inbound B2B Fields” to define or update your inbound B2B custom fields.

| | Field Name | Field Type | Options (for field type "Select" only) | Default Value |
|------------------|---------------------------------------|-----------------------------------|--|----------------------|
| Custom Field 01: | <input type="text" value="District"/> | <input type="text" value="Text"/> | <input type="text"/> | <input type="text"/> |
| Custom Field 02: | <input type="text" value="Impact"/> | <input type="text" value="Text"/> | <input type="text"/> | <input type="text"/> |

A custom field defined as Field Type “Select” should enter “Options” in pipe delimited format.

Note that anything after the first blank field definition is ignored.

3.5. Configure script deployment options and notification URL

Configure hx_escalation_sl deployment

Login to your NetSuite account, navigate to:
Setup > Customization > Script Deployment

| Script Deployments | | | |
|--------------------|--|---------------------------|--|
| Edit View | ID | Script | |
| Edit View | customdeploy_hx_escalation_sl | hx_escalation_sl | |
| Edit View | customdeploy_hx_fromhubqueue_sl | hx_fromhubqueue_sl | |
| Edit View | customdeploy_hx_case_customize_ue | hx_case_customize_ue | |
| Edit View | customdeploy_hx_fromhubqueue_scheduled | hx_fromhubqueue_scheduled | |
| Edit View | customdeploy_hx_preference_sl | hx_preference_sl | |

It is necessary to make custom_deploy_hx_escalation_sl to execute as Administrator in order to allow attachment to the B2B escalation record.

Edit Script Deployment

Save | Cancel | Reset | Change ID | More Actions

Script hx_escalation_sl
*Title hx_escalation_sl
ID customdeploy_hx_escalation_sl

Event Type
Log Level Error
Execute as Role Administrator
Available Without Login
URL /app/site/hosting/

Deployed
*Status Released

In “Execute as Role”, select “Administrator”, and Save.

Configure instant inbound message pick up

Back to your NetSuite account, navigate to:
Setup > Customization > Script Deployment

And locate script deployment customdeploy_hx_fromhubqueue_sl (for script hx_fromhubqueue_sl) as shown below. If you don't see it, check the filters at the bottom of this page:

Script Deployments

| Internal ID | Edit View | ID | Script |
|-------------|---|--|---------------------------|
| 1 | Edit View | customdeploy1 | Generate Record Logs |
| 39 | Edit View | customdeploy_hx_fromhubqueue_scheduled | hx_fromhubqueue_scheduled |
| 40 | Edit View | customdeploy_hx_preference_sl | hx_preference_sl |
| 41 | Edit View | customdeploy_hx_fromhubqueue_sl | hx_fromhubqueue_sl |
| 42 | Edit View | customdeploy_hx_escalation_sl | hx_escalation_sl |
| 43 | Edit View | customdeploy_hx_case_customize_ue | hx_case_customize_ue |

Click on “edit” on the left of customdeploy_hx_fromhubqueue_sl

Edit Script Deployment

[Save](#) [Cancel](#) [Reset](#) [Change ID](#) [More Actions](#)

Script hx_fromhubqueue_sl Event Type

* Title Log Level

ID customdeploy_hx_fromhubqueue_sl Execute as Role

Deployed Available Without Login

* Status URL /app/site/hosting/

In “Execute as Role”, select “Administrator”.

Check “Available Without Login”, and Save.

After Save, re-open the script deployment in “View mode”.

Right click the field value of “External URL”, and copy the link location.

Script Deployment

More Actions ▾

Script: hx_fromhubqueue_sl Status: Released Available Without Login:
 Title: Hubcase Message Pick Up Event Type:
 ID: customdeploy_hx_fromhubqueue_sl Log Level: Error URL: /app/site/hosting/scriptlet.nl?script=49&deploy=1
 Deployed: Execute as Role: Administrator External URL: https://forms.na1.netsuite.com/app/site/hosting/scriptlet.nl?script=49&deploy=1&comp=

Audience ▾ Links ▾ Execution Log History ▾

Roles **Groups** All E...
 All Roles Employees Pa...
Departments All P...

More Actions ▾

Context menu for External URL:
 Open Link in New Tab
 Open Link in New Window
 Open Link in New Private Window
 Bookmark This Link
 Save Link As...
Copy Link Location (highlighted)
 Inspect Element (Q)

Note that each organization has a different value, you cannot use the value from the screen below:

Now you need to go back to your Hubcase portal, and open Organization > Manage, and paste the url to the “Notification URL” field at the bottom of the form. Then “Update”

Check here if your org has a CRM/Ticketing system (e.g. Salesforce, NetSuite, Dynamics CRM) already.

The primary, in-house/existing system: NetSuite

Notification URL: https://forms.netsuite.c
 Used to trigger your in-house system to pick up escalation messages, see configuration guide for your specific system.

The notification URL is a “trigger” provided by Hubcase for NetSuite Bundle so that when there are inbound B2B messages ready for your Netsuite, Hubcase will be able to notify your NetSuite instance to pick up.

Configure scheduled inbound message pick up

Instead of instant message pick up, you could alternatively schedule message pick up periodically on an interval.

| Script Deployments | | | | | |
|--------------------|---|----------------------------------|----------------------|------------|--|
| Edit View | ID | Script | Status | Type | |
| Edit View | customdeploy_hx_escalation_sl | hx_escalation_sl | Released | Suitelet | |
| Edit View | customdeploy_hx_fromhubqueue_sl | hx_fromhubqueue_sl | Released | Suitelet | |
| Edit View | customdeploy_hx_case_customize_ue | hx_case_customize_ue | Released | User Event | |
| Edit View | customdeploy_hx_fromhubqueue_scheduled | hx_fromhubqueue_scheduled | Not Scheduled | Scheduled | |
| Edit View | customdeploy_hx_preference_sl | hx_preference_sl | Released | Suitelet | |

The sample setting below scheduled pick up every 15 minutes

Edit Script Deployment

Save More Actions ▾

Script * Status

* Title See Instances

ID Log Level

Deployed Execute as Role

Schedule Execution Log History

Single Event

Daily Event Repeat every day(s)

Weekly Event Repeat every weekday

Monthly Event

Yearly Event

*** Start Date Start Time Repeat**

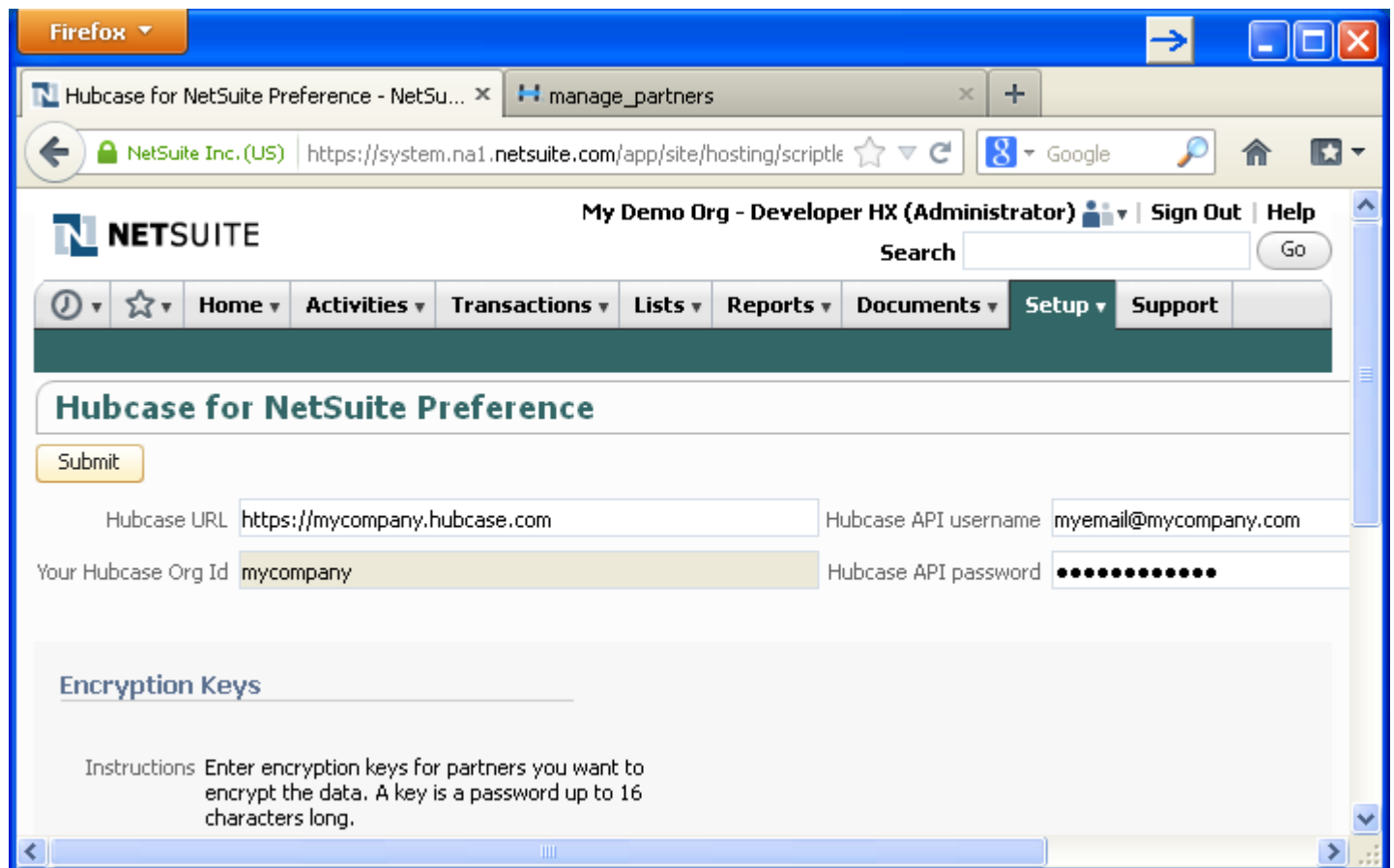
End By

No End Date

4. Configure “Hubcase Preference” in NetSuite

You have installed “Hubcase for NetSuite” bundle, and setup your Hubcase membership, this step is to establish the link between the two.

Login to your NetSuite account, and navigate to Setup > Integration > Hubcase for NetSuite preference



The screenshot shows a Firefox browser window displaying the NetSuite interface. The address bar shows the URL: `https://system.na1.netsuite.com/app/site/hosting/scriptlet`. The page title is "Hubcase for NetSuite Preference - NetSuite". The user is logged in as "My Demo Org - Developer HX (Administrator)". The navigation menu includes "Home", "Activities", "Transactions", "Lists", "Reports", "Documents", "Setup", and "Support". The "Setup" menu is expanded, showing "Hubcase for NetSuite Preference".

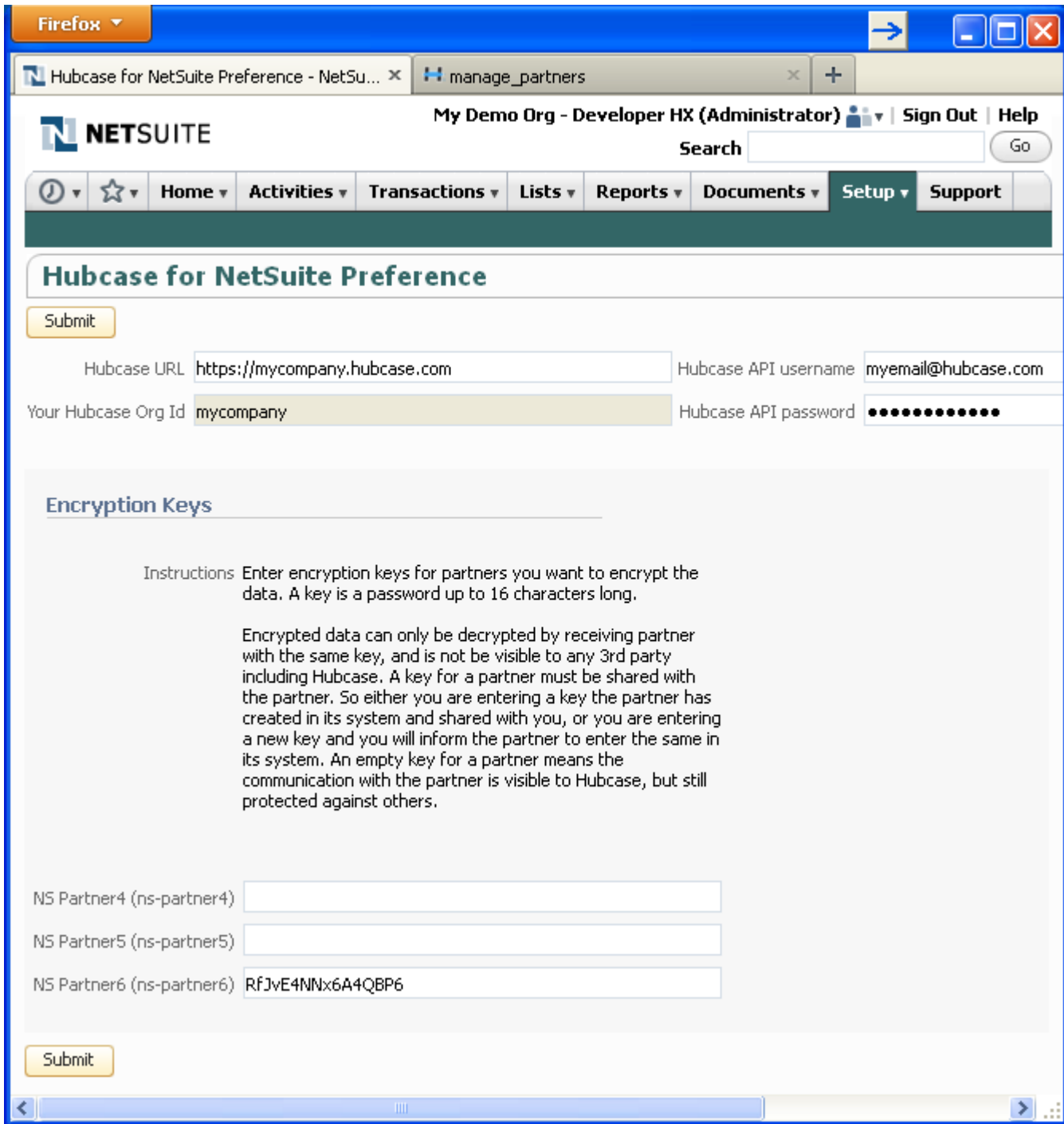
The configuration page has a "Submit" button and the following fields:

- Hubcase URL: `https://mycompany.hubcase.com`
- Hubcase API username: `myemail@mycompany.com`
- Your Hubcase Org Id: `mycompany`
- Hubcase API password: `.....`

Below the form is a section titled "Encryption Keys" with instructions: "Enter encryption keys for partners you want to encrypt the data. A key is a password up to 16 characters long."

Enter your Hubcase access information as described in “3.2. Login to your Hubcase portal account”

After entering your correct credential for Hubcase, you will be prompted to enter encryption keys for the partners you want to have the data exchange encrypted. Follow the instructions on the screen.



5. Set role permissions

Permission “Custom Record Entries” at Level “Full” is required for any role needing to access B2B escalation features. See the screenshot below.

The screenshot displays the CRM Role configuration interface. At the top, a navigation bar includes Home, Activities, Transactions, Lists, Reports, Documents, Setup, Support, Sales Tools, and Knowledge Base. Below this, the 'Role' configuration page is shown for 'Support Manager - Custom' (ID: customrole1013, Center Type: Support Center). The configuration includes various restriction options (Employee, Department, Class) and checkboxes for permissions like 'Do Not Restrict Employee Fields', 'Restrict Time and Expenses', 'Sales Role', 'Support Role', 'Web Services Only Role', 'Single Sign-on Only', 'Partner Role', and 'Inactive'. The 'Support Role' checkbox is checked. Below the role configuration, a 'Permissions' tab is active, showing a table of permissions for the 'Custom Record' category.

| Permission | Level |
|-----------------------|-------|
| CRM Groups | Full |
| Custom Record Entries | Full |

6. Testing your first B2B escalation

As a validation of your installation, setup and configuration, we will have a test case and escalate it to a partner organization “ns-partner5”.

Make sure to confirm that “ns-partner5” accepted your invitation. If it shows up under “Organization > Partners” menu, it has accepted.

Create a test case, and save. Once saved, a “B2B via Hubcase” subtab will appear under the case. Click on the B2B subtab, and then “Escalate to (New) partner”

The screenshot shows the NetSuite CRM interface for a case titled "Case: 190 File Upload Failed (Baron Chess & Assoc.)". The interface includes a navigation menu with options like Home, Activities, Transactions, Lists, Reports, Documents, Setup, and Support. The case details are displayed in a table format under "Primary Information" and "Incident Information".

| Primary Information | | |
|---------------------|----------------------|----------------------------------|
| Number | 190 | Contact |
| Subject | File Upload Failed | Baron Chess & Assoc. ; Bob Chess |
| Company | Baron Chess & Assoc. | Priority |
| Assigned To | Brad M Sparling | Medium |
| | | Date Closed |
| | | Date Last Reopened |
| | | Status |
| | | In Progress |

| Incident Information | | |
|----------------------|-------------------|-----------------------|
| Incident Date | 2/12/2013 8:33 pm | Product |
| Item | | Module |
| Serial/Lot Number | | Type |
| | | Case Issue |
| | | Origin |
| | | Inbound Email Address |

At the bottom of the case view, there are three subtabs: "Customer Interaction", "Internal Notes", and "B2B via Hubcase". The "B2B via Hubcase" subtab is highlighted with a red box. Below the subtabs, there is a large button labeled "Escalate to (New) partner".

Select ns-partner5 for the “B2B Destination Partner” field, and populate necessary information as shown below, and then “Submit”.

Escalate to (New) partner

Submit Back to case

B2B Initiating Partner mycompany

Initiator Company mycompany

Initiator Case Reference 190

* Initiator Contact Name Brad M Sparling

* Initiator Contact Phone 650-555-3226

* Initiator Contact Email bsparling@wolfeelectronics.com

Case 100340

Global HX ID

B2B Escalation Status New

B2B Escalation Priority High

Attach a file (max 1mb) Browse...

SLA5 Contract No.

* Summary File Upload Failed

Description
2/12/2013 8:34 pm by Customer:
File Upload Failed

* B2B Destination Partner ns-partner5 (NS Partner5)

Destination Company NS Partner5

Destination Case Reference

Destination Contact Name

Destination Contact Phone

Destination Contact Email

* Destination Account mycompany

Customer Company Baron Chess & Assoc.

Customer Contact Bob Chess

Customer Contact Phone 650 627 1000

Customer Contact Email chess@chessart.com

After “submit”, navigate back to the case, and click B2B subtab, if you see “Global HX ID” field populated, it’s an indication that the escalation has successfully arrived at Hubcase, and your configuration worked!

The screenshot shows a NetSuite interface for a case titled "Case: 190 File Upload Failed (Baron Chess & Assoc.)". The interface includes a navigation bar with "Edit", "Back", and "More Actions" buttons. Below this are sections for "Primary Information" and "Incident Information".

Primary Information:

- Number: 190
- Subject: File Upload Failed
- Company: Baron Chess & Assoc.
- Assigned To: Brad M Sparling
- Contact: Baron Chess & Assoc. : Bob Chess
- Email(s): chess@chessart.com
- Phone: 650 627 1000
- Status: In Progress
- Priority: Medium
- Date Closed
- Date Last Reopened

Incident Information:

- Incident Date: 2/12/2013 8:33 pm
- Item
- Serial/Lot Number
- Product
- Module
- Type
- Case Issue
- Origin
- Inbound Email Address

The "B2B via Hubcase" tab is active, showing details for an escalation to "NS Partner5".

B2B via Hubcase Details:

- Summary: File Upload Failed
- Internal HX ID: 6
- Global HX ID: mycompany-20130213-178331 (highlighted in red)
- HX Escalation Status: New
- Priority: High
- Description: 2/12/2013 8:34 pm by Customer: File Upload Failed
- Initiator Company: mycompany
- Initiator Case Reference: 190
- Initiator Contact Name: Brad M Sparling
- Initiator Contact Phone: 650-555-3226
- Initiator Contact Email: bsparling@wolfeelectronics.com
- Customer Company: Baron Chess & Assoc.
- Customer Contact: Bob Chess
- Customer Contact Phone: 650 627 1000
- Customer Contact Email: chess@chessart.com
- Destination: ns-partner5
- Destination Company: NS Partner5
- Destination Case Reference
- Destination Contact Name
- Destination Contact Phone
- Destination Contact Email
- Destination Account: mycompany
- SLA5
- Contract No.

Reply to NS Partner5

| Id | Date Created | HX (B2B) Status | Comment By | Comment | Attachment |
|----|--------------------|-----------------|------------|---|------------|
| 6 | 2/13/2013 10:29 am | New | mycompany | Initial B2B escalation. see description | |

And, for your information ns-partner5 has received an inbound support case as shown below because of your test escalation

Case: 110 File Upload Failed (mycompany)

Primary Information

| | | | | | |
|-------------|--------------------|----------|--------------------------------|--------------------|--------|
| Number | 110 | Contact | | Priority | Medium |
| Subject | File Upload Failed | Email(s) | bsparling@wolfeelectronics.com | Date Closed | |
| Company | mycompany | Phone | 650-555-3226 | Date Last Reopened | |
| Assigned To | | Status | Not Started | | |

Incident Information

| | | | | | |
|---------------|--------------------|------------|--|-----------------------|--|
| Incident Date | 2/13/2013 10:31 am | Module | | Origin | |
| Item | | Type | | Inbound Email Address | |
| Product | | Case Issue | | | |

Communication | **Related Records** | **Escalations** | **Time Tracking** | **System Information** | **Custom** | **Sales Associate** | **B2B via Hubcase**

mycompany (inbound) | Escalate to (New) partner

| | | | | | |
|----------------------|---|--------------------------|--------------------------------|----------------------------|-------------|
| Summary | File Upload Failed | Initiator | mycompany | Destination | ns-partner5 |
| Internal HX ID | 9 | Initiator Company | mycompany | Destination Company | NS Partner5 |
| Global HX ID | mycompany-20130213-178331 | Initiator Case Reference | 190 | Destination Case Reference | 110 |
| HX Escalation Status | New | Initiator Contact Name | Brad M Sparling | Destination Contact Name | |
| Priority | High | Initiator Contact Phone | 650-555-3226 | Destination Contact Phone | |
| Description | ----- 2/12/2013 8:34 pm by Customer: File Upload Failed | Initiator Contact Email | bsparling@wolfeelectronics.com | Destination Contact Email | |
| | | Customer Company | Baron Chess & Assoc. | Destination Account | mycompany |
| | | Customer Contact | Bob Chess | SLA5 | |
| | | Customer Contact Phone | 650 627 1000 | Contract No. | |
| | | Customer Contact Email | chess@chessart.com | | |

Reply to mycompany

| Id | Date Created | HX (B2B) Status | Comment By | Comment | Attachment |
|----|--------------------|-----------------|------------|---|------------|
| 9 | 2/13/2013 10:31 am | New | mycompany | Initial B2B escalation. see description | |

Congratulations! You have completed your installation and configuration of Hubcase for NetSuite.

If you have any questions, please email support@hubcase.com