Glossary

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Glossary

A

Account type

A category of transactions for a general ledger account. In NetSuite, account types are Accounts Payable, Accounts Receivable, Bank, Cost of Goods Sold, Credit Card, Equity, Expense, Fixed Asset, Income, Long Term Liability, Non-posting, Other Current Asset, Other Current Liability, Other Expense, and Other Income.

Accounting Rules

A feature used in Custom Transactions v2 that enables you to change the posting account defined by the item record. Using accounting rules, you can specify the criteria under which the default posting account used in Sales and Purchase custom transactions should be changed.

Actions menu

A user interface element in NetSuite. The Actions menu contains a list of ancillary actions that can be taken on the record. The options in the Actions menu vary depending on record type.

Active configuration

The automatic location assignment configuration currently selected for a subsidiary. Only one configuration can be active per subsidiary.

Activity

CRM-related actions concerning customers, leads, or prospects in the form of phone calls, tasks, events, notes, messages, and campaigns.

Actual Demand

A Master Production Schedule (MPS) term that represents sales order demand. This includes sales orders and transfer orders for the following Firm, open, and Pending Fulfilment statuses.

Add to Shortcuts

A link on most NetSuite pages in the More menu. By clicking this link, you can add a shortcut to the Shortcuts menu available on any page. For example, if you work in the sales department and frequently enter sales orders, add a shortcut to the Enter Sales Orders page.

Adjusted Available Balance

A Master Production Schedule (MPS) and Material Requirements Plan (MRP) calculation that represents the projected quantity available for an item when a planned order is included. In other words, this figure shows the quantity after these orders are released.

Advanced Employee Permissions

A SuitePeople HR feature that gives administrators more flexibility and control over which fields and sublists on the employee record are available to a role, based on the assigned employee permissions.

Advanced Order Management

A NetSuite add-on that makes the following two features available:

- Automatic Location Assignment: Enables you to automate the assignment of fulfillment locations to sales order lines based on business rules you set in a configuration record.
- Fulfillment Request: Enables you to work with the fulfillment request transaction. The creation of fulfillment requests can be automated.

Advanced Partner Center

A customizable role you can assign to your partners in NetSuite and NetSuite CRM+. The Advanced Partner Center gives a partner access to their customers, campaigns, opportunities, and sales orders, as well as reports pertaining to partners.

Advanced promotion

A promotion created using the advanced promotions Bundle. In general, advanced promotions have richer functionality than standard promotions. There are three types of advanced promotions: Item-based promotions, Order-Based promotions, and Buy X Get Y promotions.

Aging report

A list of customers and how much money they owe, categorized by aging periods.

Allocation

A feature that enables you to meet demand requirements with the right product, amount, and location, by the required date. Supply Allocation matches inventory supply sources to demand sources. Supply Allocation can expand inventory commitment calculations to consider future inventory on supply orders in addition to current, on-hand inventory.

Allocation calculation

A feature that assess current and future inventory supply and determine the best ways to allocate supply to the demand on orders. NetSuite bases these calculations on the allocation strategies defined on order lines. The system can perform calculations automatically based on preference settings or predetermined schedules.

Allocation Exception

Supply Allocation matches supply with demand based on allocation strategies. It identifies orders that will not have a supply source to meet the demand by their Supply Required By Date. When this occurs, NetSuite generates a Supply Allocation Exception to warn you that demand may not be met in time.

Allocation strategies

Records that enable you to define rules for allocating inventory. When you allocate inventory for particular types of orders, NetSuite assigns allocation strategies to order lines.

Amortization template

Records that define how to post expenses when the Amortization feature is enabled. These templates are used to generate amortization schedules for associated items and expenses.

Analytical record type

Record types created specifically for SuiteAnalytics Workbook that combine fields from various record types and predefined criteria.

Analytics data source

The data source used by SuiteAnalytics Workbook. Record types and fields in this data source might have different locations or labels than the data sources used for saved searches and reports.

As Of Date

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A specific date that indicates when an event begins or takes effect. For example, the As of Date field on the invoice record indicates the date on which charges started on an invoice. This date can also represent when a piece of information became effective, regardless of when a particular event occurred.

Assembly item

An assembly item is an inventory item made of several components (defined by a Bill of Materials) but is identified as a single item. Assemblies are manufactured by combining raw materials you stock.

You create assembly item records to define the members of an assembly, then NetSuite enables you to track both the raw materials and the assembled items separately.

Asynchronous

The ability to queue up multiple requests and then poll the system at a later time for the results.

Audience

Specific users, roles, or groups who have access to certain files or forms. You can also use NetSuite to publish a website or web page to a particular audience. Choose an audience on the Audience subtab on applicable NetSuite records such as files, folders, and website pages.

Auto-Apply Promotions

A SuitePromotions feature that lets you automatically apply multiple promotions to a transaction.

Auto-Apply Prepayments

A Vendor Prepayments feature that automatically applies vendor prepayments to the vendor bills when you associate a vendor prepayment with the corresponding purchase order.

Auto-Create Rule

A reconciliation rule that enables you to automate the process of creating and matching GL account transactions directly from imported bank data. You can automatically create and match bank deposits and charges, and credit card charges and refunds. Auto-create rules can contain multiple conditions, along with action data. Auto-create rules automatically create new GL transactions from imported bank lines that match the rule criteria based on the defined actions of the rule.

> **ⓘ Note:** Transactions that are automatically created and matched by an auto-create rule do not impact your GL account until you submit them on the Match Bank Data page.

Automatic location assignment configuration

A collection of automatic location assignment rules and backorder rules. Automatic location assignment evaluates rules in the configuration in ascending order. Each subsidiary in a company can be assigned one configuration only, known as the active configuration.

Automatic location assignment rule

One or more criteria used by automatic location assignment to determine the ideal fulfillment location for a sales order line. The criteria in a rule include:

- Location type
- Distance from shipping address
- Option to minimize fulfillment locations
- Fulfillment strategy

A rule is defined in a configuration, and becomes exclusive to the configuration when added to the list of rules in the configuration.

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Automation event

A business event used to automate aspects of order management in NetSuite.

Automation process

A business process in the Advanced Order Management add-on that can be automated by NetSuite. Automation processes happen asynchronously. Examples of automation processes include automatic location assignment (to assign fulfillment locations to sales order lines based on one or more business rules), and fulfillment request creation (to create fulfillment request records from sales orders).

Available Online box

A record setting that specifies when information can be displayed online. Check this box to publish information or make an item available for purchasing or viewing online.

B

Backorder rule

An automatic location assignment rule that is evaluated by the engine after all other rules have been evaluated and there are still sales order lines without a location assigned. Backorder rules do not take inventory levels into account.

Best Offer

A SuitePromotions feature that ensures the available promotions that give the customer the largest discount available are applied to a transaction.

Bill of distribution

A Bill of Distribution (BOD) specifies how a product is distributed within your enterprise after being received from a supplier or manufacturing, before being passed on to the customer.

Bill of materials

A Bill of Materials, or BOM, lists raw materials, assemblies, sub-components, parts, and quantities needed to manufacture a product. A BOM can be used to communicate between manufacturing partners, multiple facilities within the organization, or with a single manufacturing plant.

Bill of resources

A Bill of Resources (BOR) is a list of resources, such as labor, needed to complete a saleable product. It is used in capacity planning to prioritize and schedule work in manufacturing, by highlighting critical resources.

Billable item

An item your business purchases for a specific customer. In NetSuite, you can track purchases made for customers and then invoice the cost back to them.

Billable time

The amount of time an employee spends working on a job for a specific customer. In NetSuite, you can track time spent on jobs for customers and then invoice the cost back to them.

Bins

Locations within a warehouse to track exactly where items are stored. Use bins to receive and fulfill items quickly and accurately, as well as track on-hand stock counts for each bin.

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Cache

A memory space in your computer that holds temporary internet files. Increasing the space you set for this folder can increase how fast pages are loaded, but it also decreases the amount of space available on your computer. NetSuite caches some pages to make load times faster.

Calculated measure

A measure that you can create in your workbook pivot tables and charts using arithmetic operations with the measures available in the connected dataset.

Campaign

A series of marketing efforts, such as email, phone, direct mail, or printed advertisements, used to generate leads and revenue. You can set up and manage campaigns in NetSuite or NetSuite CRM+ when you enable Marketing Automation.

Capacity requirements planning

An accounting method used to determine the available production capacity of a company.

Case

A record created to document a problem, question, or other feedback from a customer. Case records can be assigned to support representatives, who can use the case record to respond to the customer by email, or to document a support phone call. Cases are customer-facing records, whereas issues are internal company records.

Catalog tab

One of five tabs that appear to customers when they go to your Site Builder web store. When customers click the Catalog tab, they view web store categories you create and then navigate to the products and services they want to buy.

Category

A division of customer and vendor records into groups you specify in NetSuite. Categories help organize records to make it easier to manage your business. Use Accounting Lists to set up customer, vendor, or budget categories. You can use Web Site Categories in a Site Builder web store to organize products for sale online.

Center

The set of tabs each role has access to. For example, Administrators work in the Classic Center, which has the Lists, Transactions, and Reports tabs. Accountants work in the Accounting Center, which has the Customers, Vendors, Payroll and HR, and Financial tabs.

Child items

Items records that are associated with the same parent item record, typically used in an item matrix.

Child String

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A type of a string in the string hierarchy available in Manage Translations UI. It can be created by linking a stand-alone string to a custom string. It cannot be deleted and it inherits its description and translations from its parent string.

Churn

Lost customers, lost revenue.

Class

A way to separate and track records such as financials, transactions, and employees. For example, a janitorial service wants to track household and commercial accounts separately. After they set up a class for each of these account types, they can track the financial performance of each class over any period of time.

Closest location

A fulfillment strategy in an automatic location assignment rule. The closest location strategy aims to assign the fulfillment location that is closest (in a straight line) to the shipping address.

Commerce Solutions

The general feature area containing all web store functionality within the NetSuite ecosystem. Commerce solutions include:

- **SuiteCommerce** - a flexible, fast, and engaging ecommerce solution that is fully integrated with core NetSuite business systems. SuiteCommerce leverages Commerce themes and extensions to quickly build and customize engaging web stores.
- **SuiteCommerce Advanced** – an ecommerce solution that provides all of the functionality of a SuiteCommerce implementation, but also provides complete control over the source for advanced customization beyond what can be done with themes and extensions.
- **SuiteCommerce In Store (SCIS)** - a web-based point-of-sale (POS) application providing a touch-based user interface designed for tablets. SCIS integrates fully with NetSuite, so users can leverage a wide range of NetSuite tools for reporting, accounting, and transaction processing. Retailers can use SCIS as part of a larger SuiteCommerce web store offering or they can focus on face-to-face POS transactions made within physical locations.
- **Site Builder** – a legacy solution for creating and customizing a web store.

Commerce web stores

The collective term used when referring to the Commerce product grouping of SuiteCommerce (SC) and SuiteCommerce Advanced (SCA).

Comma Separated Value

A file format you can use for importing and exporting data in and out of NetSuite.

Commitment

The state of intent for an item in inventory. An item that is committed is intended to be used to fulfill an open order. Tracking commitment enables you to determine how much stock on hand is available to be sold. Commitment also helps you track how many to order when item stock is low.

Compensation Tracking

A SuitePeople HR feature that enables you to track basic wage and salary information for employees directly from the employee record.

Computer Planned Order

A feature that refers to a planned order (work, purchase, or transfer order), generated by MPS or MRP to resolve a negative balance for the item's projected available quantity.

Consolidated

A rollup of multiple subsidiaries' data for a parent subsidiary, as in reports, quotas and sales forecasts, and exchange rates in NetSuite OneWorld. Note that in NetSuite, consolidated payments do not relate to OneWorld, but instead refer to the rollup of subcustomer data for a parent customer.

Core Promotion

A promotion that is not a SuitePromotions promotion, nor a shipping item, and not a promotion created with the Advanced Promotions bundle. It is widely known as Standard Promotions.

Core Administration Permissions

A feature that can be enabled for a role and gives the role access to a functionality that is currently only accessible to the standard Administrator role. When customized, the Core Administration Permissions role can provide almost the same access as the Administrator role, but without access to sensitive data and information.

Correlation

The percentage of customers that purchased both the items you want to upsell and each item in your upsell search results.

Cost Calculation

A calculation which helps you calculate the costs for the work breakdown structure and budget. You define the source and enter the rate. NetSuite calculates the cost.

Credit card payment

A payment a customer makes using a credit card. In NetSuite, these payments can take place over the internet and are entered as a cash sale or customer payment. These payments have immediate accounting impact on your books, and the proceeds are deposited directly into your company's bank account.

Crosslinks

A feature that enables you to navigate between pages centered around the same record type rather than access these pages through menus. Typically crosslinks appear at the top of record pages. Common examples of crosslinks are Search and List.

Cumulative lead time

The total lead-time needed to produce an item. This assumes that everything has to be done from scratch, all sub-assemblies have to be built and all purchased components have to be ordered and received), so that all lead-times are added together in linear fashion.

Custom form

A form you can modify based on the needs of your business.

Custom parser

A parser that a plug-in author creates using a plug-in script interface which is used to parse and retrieve financial data. After the parser is developed and uploaded to NetSuite, you can associate it with a format profile record. If the parser supports parser configuration and was created using the Financial Institution Parser Plug-in interface, the Parser Configuration subtab appears and is populated with configuration values you can configure.

Customer Center

A user-restricted role that has permission to:

- See current orders, estimates and transaction histories.

- Enter an order.
- Make payments on open invoices.

Customer segment

A group of web store customers for whom you can configure a personalized catalog view. Supported customer segments are customer groups, anonymous users, recognized and logged in users, and all users.

Customize menu

A user interface element in NetSuite located in the upper-right corner of all customizable records.

Customization Manager

A consolidated view of all business record types in the system. You can view lists of the various record types and select records to view and maintain. You can also create new fields and sublists to include on a record. A unified location to set up mandatory fields makes it convenient to maintain mandatory settings for multiple fields at the same time. When you make a field mandatory, the change is automatically saved to the server.

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D

Daily shipping capacity

The number of shipping orders that can be assigned to a location in a one-day period. The daily shipping capacity usually has a direct correlation with the number of orders that employees at the location are expected to be able to process in a one-day period.

The daily shipping capacity is defined on the location record.

Date of first sale/date of first order

A hidden variable that validates whether there is enough information to process for an item. NetSuite uses the first sale or first order date (based on the Transaction to Consider preference). If you use Multi-Location Inventory, this is calculated for each item/location pair. If you do not use Multi-Location Inventory, it is calculated for each item.

Dataset

The basis for all workbooks and workbook visualizations, a dataset combines record type fields and criteria filters to create a query. The results of this query act as the source data for the workbook visualizations you create. A single dataset can be used in multiple workbook visualizations, so to prevent data discrepancies, they can only be edited or deleted by dataset owners or users with the Analytics Administrator permission. Additionally, you can use multiple different datasets in the same workbook, enabling you to analyze different metrics.

Date–based grid view

The date-based grid view enables you to review all planning entries for an item and location by period. It also displays planned orders suggested by the supply planning process to balance supply and demand. This grid enables you to review cause and effect by period and forecast trends for the item and location over time. It also shows the planning results for the item by period.

Default parser

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A built-in transaction parser in NetSuite that is not customizable. Supported file formats are OFX or QFX, CSV, BAI2, and CAMT053.001.06. With the BAI2 format, NetSuite includes support for TD, Wells Fargo, US Bank, JP Morgan Chase, and Bank of America Merrill Lynch.

If you have a format profile record set up for manual import for bank reconciliation, you should use the standard parsers available through the Bank Statement Parsers SuiteApp. Alternatively, you can develop and use your own parser.

To automate imports for bank reconciliation, you can configure the financial institution and format profile record provisioned by the Bank Feeds SuiteApp. These records contain a standard parser and connectivity plug-in that let you directly connect to financial institutions in the United States, Canada, or Europe. To retrieve data from financial institutions outside of the United States, Canada, or Europe, you need to develop and use your own parser.

Demand planning

A feature that focuses on future demand for products from various sources, such as customer sales orders or spare parts for customer service, to create a projection of demand, or forecast.

Demand time fence

Time fences are boundaries between different periods in the planning horizon. The Association for Supply Chain Management (APICS) defines a demand time fence as "that point in time inside of which the forecast is no longer included in Total Demand." In other words, within the demand time fence, only sales orders are included in total demand and therefore used in other calculations involving total demand.

Demand driven Material Requirements Planning

A formal multi-level planning and execution method for planning material needs enabling a company to build more closely to actual market requirements.

Department

A division or section of your business. Use departments to separate and track records such as financials, transactions and employees. For example, you can create a department for each team of employees dedicated to a certain area of business, and then track income and expenses by each department over any period of time.

Dependent demand

A demand for sub-assemblies or components based on the Bill of Materials and, so is dependent on demand for the item being manufactured.

Deployment

A script that has been associated with specific record types or scheduled to be run. There can be multiple deployments for each defined script.

Discount

An amount deducted from the usual list price of an item line or order total of a transaction. Discounts are applied to transactions via promotions.

Discount item

An accounting tool used in NetSuite, to track discount amounts without affecting inventory valuation. It can also specify which account, if any, the promotion should be posted to.

Discrete manufacturing

The production of distinct items such as automobiles, appliances, or computers.

Display code

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A field on an item record where you can enter a number, in addition to the item name, that is used to identify that item. It appears as a column in your items list and in the Item column on invoices.

Display name

A field on an item record where you can enter a name, in addition to the item name, that is used to identify that item. It appears as a column in your items list and in the Item column on invoices.

Downsell

A decrease in revenue (for example, offering a customer a 10% discount to renew their subscription or as an incentive to purchase multiple subscriptions).

Drill down

A feature allowing you to click a link in a list, report, or register, to view or edit at a more detailed level. For example, you can drill down on a check by clicking the date of the check to see when it was written or when it cleared the bank.

Dunning director

A custom role provided by the Dunning Letters SuiteApp. It is based on the standard Accountant role, with additional permissions to access dunning features.

Dunning manager

A custom role provided by the Dunning Letters SuiteApp. It is based on the standard A/R Clerk role, with additional permissions to access dunning features.

Dunning procedure

A record that defines the escalation points or dunning levels, and the time that must elapse before a dunning letter is sent to a customer. It is a custom record provided by the Dunning Letters SuiteApp.

Dynamic defaults

NetSuite tags you can include in the default definition when working with custom free-form text, text area, rich text, or hypertext fields. These tags are populated with field values when the page is loaded or saved.

Dynamic group

A group of relationship records created from a saved search. Because the set of criteria for the group is saved, new records that fit the criteria of the group are automatically added to the group.

Dynamic hyperlink

A hyperlink field whose default uses information from the records or the current logged in session as part of the URL parameter.

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Effective Dating

A SuitePeople HR feature that enables you to make changes to the employee record that are back-dated or future-dated to a specific date.

Emerging Issues Task Force 08-01 Revenue Recognition

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A legacy NetSuite revenue recognition feature that automates the pricing and revenue allocation processes required to comply with theEITF 08-01 accounting rule. This rule requires companies selling products and services with multiple elements to report both recurring and non-recurring revenue items based on estimated selling prices. This feature is available as a managed SuiteApp to those using the legacy revenue recognition feature. EITF 08–01 is currently referred to as Accounting Standards Codification (ASC) 605–25, but the name of the SuiteApp has not changed.

Employee Center

A user-restricted role with permission to:

- See approved and unapproved expense reports, purchase requests and time reports.
- Enter expense reports, purchase requests, and time.
- Edit unapproved expense reports and purchase requests.

Employee Center Dashboard Publishing

A SuitePeople HR feature that enables you to manage Employee Center Publishing global permissions, news item records and permissions, as well as manager dashboards in the Employee Center.

Employee Change Requests

A SuitePeople HR feature that enables managers to request changes for their direct reports in the Employee Center and have them go through an approval process which you can define in SuiteFlow.

Employee Directory

A SuitePeople HR feature that enables you to search for employees by name, department, job title, or (with NetSuite OneWorld accounts) subsidiary.

Employee Status

A value used to categorize an employee's work status. For example, part-time, full-time, and temporary.

Employee Status Category

A feature used to track the employment lifecycle of your employees as they transition through the company. Employee status categories include prehire, actively employed, and terminated.

Employee Type

A value used to categorize employees for descriptive or reporting purposes. For example, contractor, regular employee, and statutory employee.

Employee Type Category

A classification of the different types of workers in your company. For example, permanent and contractor.

Empty Timesheets

The total number of timesheets without any time entries for the selected time period in the Time Entry Exception Report.

Engineer to order

A manufacturing process in which a product is designed, engineered, and finished after an order has been received. The product is engineered to meet the specifications desired by the received order.

Entity

Records that define people or organizations such as company, contact, vendor, and employee.

Evaluation order

The sequence in which automatic location assignment evaluates rules in a configuration. Rules are evaluated in ascending order (from lower to higher numbers).

Event

Time you set apart on your calendar for something such as a meeting, lunch, or another scheduled task. You can invite other people and reserve resources when you create events.

Exception message

An MPS or MRP Exception Message is generated by the system to alert the master scheduler or material planner that a situation requires some action be taken or a decision be made.

Execution system

The ERP system where business transactions are executed. This includes Sales Orders, Purchase Orders, and Manufacturing Work Orders.

Exclusive promotion

A promotion that cannot be combined with another promotion on the same transaction.

Executive Dashboard

The home page customized with portlets, snapshots, and enhanced snapshots for executives. The home page can be customized with information specific to each user's preferences.

Export

The process of transferring data from NetSuite into another program.

F

Facets

Item attributes that shoppers can use to filter their searches for products on your site. Brand, price, and color are examples of facets. A feature used exclusively in SuiteCommerce Advanced.

Fair value price list

A list of the records that define the fair value for items. Fair value price is used to allocate revenue in revenue arrangements.

Featured item

An item placed on the Home page of your Site Builder web store to make that item more visible. You can feature more than one item at a time.

Field group

A collection of fields grouped together into a logical group. You can use a field group to organize fields on a form.

Field-Level Help

A popup window containing specific information about a field on a NetSuite page. To read field-level help, click the label next to the field.

Field sets

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A SuiteCommerce Advanced feature defining the item data exposed to website templates. Field sets include real-time data from item records in your NetSuite account. A web developer can use the Item Search API to access the field sets you define.

Filled Timesheets

The total number of filled timesheets for the selected time period in the Time Entry Exception Report.

Financial Institution Connectivity Plug-in

A software component that enables you to directly connect to financial institutions, for inbound transmissions, through NetSuite. This plug-in implementation works with a parser plug-in to let you securely connect to a financial institution to automatically retrieve financial data, daily. If a format profile record has been configured to directly connect to a financial institution, NetSuite can automatically import data from your accounts every day.

When a Financial Institution Connectivity Plug-in works with a Bank Statement Parser Plug-in, you can import bank data for bank reconciliation. When a Financial Institution Connectivity Plug-in works with a Financial Institution Parser Plug-in, you can import additional data types, including corporate card charges for expense reporting.

Financial Institution Parser Plug-in

A software component that enables you to create and upload your own transaction parsers for different bank and credit card statement formats and store them in NetSuite. Transaction parsers translate the information from file formats not supported by NetSuite's default parsers and turns it into financial data that NetSuite can understand and use.

Use Financial Institution Parser Plug-ins to parse and retrieve the following:

- Bank and credit card data for matching and reconciliation
- Corporate card charges for expense reporting

> **ⓘ Note:** To import corporate card expense data, you must use a Financial Institution Parser Plug-in implementation.

Financial institution record

A record you create for a financial institution, to which you can add multiple records called format profiles. Format profiles let you set up configuration details to import financial data for bank reconciliation, or to import corporate card expenses for expense reporting. To create and save a financial institution record, you need the Financial Institution Records permission with a full access level.

Financial statement

A report that summarizes an organization's financial position. Financial statements include the balance sheet, income statement, and statement of cash flows. In NetSuite, financial statements differ from other available financial reports in the following ways: they group data by financial sections, they store report characteristics in layouts, and they have a specialized customization interface — the Financial Report Builder.

Firm planned order

A planned order that has been firmed by the Master Scheduler (MPS) or Material Planner (MRP). After a planned order is firmed it can no longer be erased prior to a new planning run. The order will persist until it is released or canceled by the Master Scheduler or Material Planner

Forecast consumption

A process predicting future demand and inventory need for a product or a service. Forecast consumption replaces forecasted demand with actual sales order demand. Each time you create a sales order line, you

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create actual demand. If actual demand is already forecasted, the forecast demand must be reduced by the sales order quantity to avoid counting the same demand twice.

Foreign trade

Transactions with companies or individuals outside of your country or the tax jurisdiction of your government. In NetSuite, this setting in the system's tax preferences allows access to tax codes which apply to these types of transactions.

Format profile

A record you add to a financial institution record that contains various settings necessary for bank data import. Format profiles let you configure how the system parses the data, as well as how the system links your GL accounts and maps your custom bank codes. You can configure a format profile for either manual import or for direct connectivity to a financial institution. You can set up configuration details to import financial data for reconciliation, or to import corporate card data for expense reporting.

Forward and backward forecast consumption days

A feature that creates a forecast consumption period, called a "window," that consists of the backward and forward consumption days added to the sales order line schedule date.

In other words, the consumption days define a forecast entry period. Consumption days are used when an exact match between the sales order date and the forecast date is not found, or when a match is found, but there are not enough items to cover the sales order quantity.

Fulfill in bulk

A feature to process multiple sales orders simultaneously for a single fulfillment location and mark them as fulfilled. Processing occurs in the background. Sales orders can be fulfilled in bulk by importing a CSV file or by selecting the sales orders on the Fulfill Orders page.

Fulfillment location

A location that prepares and ships an order to a customer. Fulfillment locations can be of type Warehouse or Store.

Fulfillment strategy

The method by which you want NetSuite to assign locations automatically to sales order lines. For example, the closest location strategy assigns the location that is closest to the shipping address in a straight line.

▲

G

Geographical restriction

A limiting to a list of possible fulfillment locations based on distance from the shipping address in an automatic location assignment. Only locations within the specified radius (expressed in miles or kilometers) of the shipping address are taken into account by the automatic location assignment engine.

Geolocation method

The way by which NetSuite calculates the geographical position of a location. NetSuite can get the position by calculating the center point of the area encompassed by a postal code or by using the latitude and longitude coordinates entered on the location record.

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Goal snapshot

A feature on a performance review that captures a view of your goals as of a specific point in time. Changes you make to a goal after the point in time do not appear on the performance review. A part of the Performance Management feature.

Goals

Personal career objectives that can be tracked to completion in NetSuite. A part of the Performance Management feature.

Governance

Mechanisms in place to monitor and control the use of automated functions, such as web services calls or the execution of SuiteScript scripts, to optimize NetSuite application and database servers.

Grand total

An option available for certain default columns and for columns added to reports when customizing a report. Checking this option adds a total and subtotal to the column of the report.

Greeting

A message you can display on the Catalog, Information, My Account and Home pages in the context of your NetSuite web store. This greeting appears in bold at the top of the page you apply it to.

Gross profit

An amount that appears on the income statement and is calculated by subtracting the cost of goods sold from sales revenue. Gross profit is also called gross margin. NetSuite's Gross Profit feature allows the estimation of gross profit per transaction using the estimated item costs and any proposed price discounts.

▲

H

Handler

The action or process performed by the business events framework in response to a business event that occurs on a record. For example, when a sales order is approved, the Automatic Location Assignment handler is called and the process to assign locations is initiated automatically.

Headcount Analysis

A high-level view of the headcount, hire, and turnover trends for employees in your company. Part of the Workforce Analytics feature.

Highest ranked location

A fulfillment strategy in an automatic location assignment rule. This strategy aims to assign the location that is ranked the highest in the region in which the shipping address is located.

Home

The first page in the NetSuite application. Home is where you arrive when you log in. You can customize the home page for each role in your NetSuite account.

Hosting

A service that enables you to store HTML and other website files for publishing on the internet. The NetSuite file cabinet provides the Web Site Hosting Files folder to host your custom HTML website pages.

Hosting root

The top-level folder in the file cabinet where you can store files for a website. NetSuite provides two hosting root folders for your website: Live Hosting Files folder and Staging Hosting Files folder. Use the hosting root to associate a site with a particular domain.

▲

I

Ignored

Recurring revenue that is not classified as **New** or **Churn** or **Upsell** or **Downsell** (for example, a renewal that extends an existing subscription).

Import

The process of transferring data from another system into NetSuite.

Independent demand

A demand for a finished product. It is demand for an item that is unrelated to the demand for other items. For example, demand for finished goods, parts required for destructive testing, and service parts requirements.

Intercompany Framework (ICF)

A feature that includes several tools to help users manage cross-subsidiary business workflows. For example, the ICF feature includes the Automation functionality. This functionality enables users to automatically generate cross charges for subsidiaries that provide business services for each other.

Internal ID

A unique internal identifier for records and forms in NetSuite. The internal ID is useful when writing SuiteScript and when referring to custom records and custom fields. Internal IDs are also useful for understanding the default URL parameters in your web store.

Inventory adjustment

A journal entry that credits an asset account for inventory and debits an expense account for inventory loss because of spoilage, theft, or miscount.

Inventory item

A NetSuite Inventory Item is an item for which the quantities and other information (for example, cost) are tracked in the Inventory system.

Inventory minimum

The least amount of inventory a company should carry to meet customer demand. You can set a reorder point on each item record, and then select inventory level warnings in the Home page preference. NetSuite will notify you automatically when your inventory reaches the quantity you entered.

Inventory part

An item you stock and sell. You can track the amount and value you have on hand.

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Issue

A record used to document a product problem, or defect that needs to be resolved. This is an internal-facing record, as opposed to a case, which is a customer-facing record.

Items

Records that track objects you utilize or services you provide in day-to-day business. Items may be inventory items that you buy and sell, assemblies you manufacture, or services you provide to customers. They can be electronic files to download or gift certificates that record prepayment. Items such as discounts or markups can affect pricing on transactions.

Item attribute

A list of information about an item. For example, color, size, or length.

Item collection

General purpose method for grouping catalog items.

Item coupon

A coupon code with a discount that is only applied to specific items.

Item definition

A NetSuite Inventory Item Definition is comprised of a name, description, and attributes that control how the item is used within the system.

Item demand plan

Records the expected future demand for an item based on previous or projected demand.

Item forecast

An item forecast displays the predicted future demand for an item.

Item process family

An item category that associates properties or attributes to identify and group similar items in your warehouse.

For example, you can create a clothing item process family to identify all clothing items.

Item process group

An item category that groups similar items in your warehouse by associating a more refined property or attribute than the item process family.

For example, if you have a clothing item process family, you can create item process groups such as pants and jeans. You can further identify and group clothing items into either of these item process groups.

Item promotion

A promotion that applies discounts to items under the applicable (inventory) item lines when it is applied to a transaction.

Item saved search

A group of items predefined in NetSuite that can be applied to a SuitePromotion, either as what the customer needs to buy, or what the customer will get.

Item segment

A group of items that can be made visible to one or more customer segments.

Item templates

Templates used to customize the look of an item when customers click the item for more information about your website. Use tags to create a template that denotes where and how the image name, price, description, or image are displayed.

▲

J

Job

Part of the Job Management feature, which is used to describe what work and responsibilities an employee could have.

Job Management

A SuitePeople HR feature that enables you to organize your employees according to the jobs that they perform.

Job Requisitions

Part of the Job Management feature, which is used for recruiting. Job requisitions are associated with jobs and their status is tracked through the hiring process.

▲

K

Key Performance Indicator

Quantifiable measurements that reflect the critical success factors of an organization and help you define and measure progress toward organizational goals. You can add up to three graphical meters to your dashboard that describe key performance indicator (KPI) information. For example, you can set up a KPI meter for sales. Your meter shows your date comparisons graphically and flags your threshold values.

Kudos

A SuitePeople HR feature that enables your employees to give social-based recognition to each other for accomplishments, achievements, and milestones.

▲

L

Last_Update_Date

A system-assigned date value associated with a record in the database, designating the most recent date that the record was updated.

Lead source

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A name or code that designates how a lead, prospect, or customer was referred to your company. If you use the Marketing Automation feature, your list of lead sources consists of the names of campaigns. You can select a lead source on a customer, lead, or prospect record.

Lead-time

The time between the beginning of a process and when the results appear.

Lift

The degree to which the item's correlation exceeds its overall purchase frequency. Lift is used to determine the reliability of two items' correlation when using the Upsell Manager. In general, high lift implies a more reliable correlation.

Line promotion

A promotion that applies discounts to items under the applicable (inventory) item lines when it is applied to a transaction.

Locale

A set of parameters that defines both user's language and country or region. Adapting a NetSuite account to a certain locale may include changing the user interface language, adjusting preferences, activating features, or installing specific SuiteApps (for example, Localization SuiteApps).

Localization

An adaptation of a NetSuite account to a specific locale. This can either mean:

- The process of adapting the NetSuite application, features, or objects in accordance with linguistic, typographical, or other needs of a specific country or region. Localization can concern formats of dates, currencies, time or numbers, direction of text, various fonts, color coding, compliance with local laws requirements and regulations, and others.

- The process of translating the NetSuite application to the locale's language.

Localization SuiteApp

A NetSuite product type which provides features for companies or organizations doing business in a certain country or region. Installing a Localization SuiteApp is often essential for making a NetSuite account fully compliant with different requirements or standards specific to that country or region. Localization SuiteApps typically deliver features from areas such as accounting, taxation, or financial reporting.

Location

A way to track information about employees and transactions for multiple offices or warehouses. For example, you can create locations for the corporate office and all of the sales offices, or for warehouses in several states. You can associate transactions and employees with each location, and then filter report data by location.

Location assignment strategy

The method by which you want NetSuite to assign locations automatically to sales order lines. For example, the closest location strategy assigns the location that is closest to the shipping address.

Location ranking

The ordering of locations in a region, representing the preferred sequence in which the automatic location assignment engine assigns locations to sales order lines.

Location type

A kind of location. Examples of location types include Store and Warehouse.

Lockout

The status of cases that have been closed for a period of time you define. Locked cases cannot be edited by customers or support representatives and cannot be assigned. Only a user with the Administrator role can reopen a locked case.

Login access

An access to individuals and companies who need to enter and view information in a NetSuite account. Individuals can have different level of access and different roles can be assigned on each record.

Lot size

The amount of a particular item that is ordered from the plant or a supplier or issued as a standard quantity to the production process.

▲

M

Mail merge

An operation allowing you to include information from a NetSuite account in business correspondence. With NetSuite's Mail Merge feature, you can create personalized email, letters, faxes, PDF documents, mailing labels, and more.

Make to order

A business production strategy that enables consumers to purchase products that are customized to their specifications.

Make to stock

A production process where products are finished before receipt of a customer order. Customer orders are typically filled from existing stocks, and production orders are used to replenish those stocks.

Manage Translations

A single-page application that is used in work with Translation Collections and to manage translation strings in the NetSuite UI.

Manufacturing and logistics data repository

A repository of data that is extracted periodically from the NetSuite ERP system. The repository acts to filter daily transactions in the execution system and enables the Master Scheduler and the Materials Planner to control the frequency of updates to the repository. This ensures that the system is reading a consistent view of the data, while processing a plan.

Manufacturing calendar

A Manufacturing Calendar designates annual operating days in advance, in each company or factory.

Master production schedule

The build schedule for items designated as MPS items. Typically, these items represent independent demand from a forecast. For example, a demand plan. The Master Scheduler maintains this schedule which then becomes a set of planning numbers that drives Material Requirements Planning. It represents what the company plans to produce expressed in specific configurations, quantities, and dates.

Master production schedule matrix

A table used to represent the Master Production Scheduling (MPs) process. It display each step of the process and the results of these calculations. It is used in most of the feature documentation for Master Production Scheduling.

Master scheduler

A person responsible for balancing supply and demand for end items, service parts, and other critical resources. They also manage the Master Production Schedule, which in turn, drives Material Requirements Planning.

Material planner

A person that manages the flow of materials to ensure that their organization never runs out of necessary manufacturing materials.

Material requirements plan

A feature that uses bills of materials data, inventory data, and the master production schedule to calculate requirements for materials. MRP makes recommendations to release replenishment orders for material.

Material requirements plan matrix

A table used to represent the Material Requirements Planning process. It display each step of the process and the results of these calculations. It is used in most of the feature documentation for Master Production Scheduling.

Media item

Any kind of file stored in the file cabinet, such as a document, mp3, or executable application installer. It can be an image on your website or your company logo. If you operate a website or store, you can attach media items to a category, tab, or item record.

Memo field

A field where you can enter a description for that transaction only. For example, when writing a check you can enter a memo at the top of the page to print on the check. At the bottom of that same page, you can enter a memo on the Expenses tab. Each memo appears with its line item and on reports related to that item. Click the word Memo on the page you are working on to find the other places where that particular memo appears.

Memorized transaction

A transaction you save to repeat in NetSuite. You can choose to have memorized transactions recur automatically or to remind you before a transaction is due so you can manually submit it. This can save you time by eliminating the data-entry process and it can also serve as a useful reminder.

Message field

A field where you can select a personal message to appear on invoices and other forms you send customers and vendors. The Message field also appears on the Checkout, Welcome, and Catalog pages of your NetSuite website. Use message fields to provide general information to customers who visit your website.

MFA

Multi-factor Authentication. For more information, see the Glossary entry for Multi-factor Authentication (MFA).

Milestone

A marker that represents the completion of one portion of a project. Tracking the completion of milestones helps you know how close the project is to completion, enabling you to bill accordingly. In NetSuite, milestone billing requires the Project Management and Advanced Billing features.

Minimize fulfillment locations

A fulfillment strategy in an automatic location assignment rule. Minimize fulfillment locations aims to assign as few locations as possible among all lines in a sales order.

Minimum order amount

The minimum amount that must be spent on a transaction before it is eligible for the promotion.

Minimum stock

The smallest number of inventory parts you want to stock. You enter this number in the Reorder Point field on the Inventory Part page. NetSuite tracks these items and notifies you when your inventory is at the minimum stock level.

Monthly Recurring Revenue (MRR)

The sum of all subscription revenue expressed as a monthly value. An important metric for Software-as-a-Service (SaaS) businesses.

Member State of Identification (MSI)

The member state of the European Union (EU) in which the taxable person is registered to use One Stop Shop (OSS), and where it declares and pays the VAT due in the Member States of consumption.

Multi-factor Authentication (MFA)

An electronic authentication method that requires the use of more than one factor to verify a user's identity. Examples of authentication factors are a password and a device (authenticator application).

Multiple pricing

A type of pricing that lets you charge different amounts for the same item. You can enter up to four prices in the base price, alternate price, and online price. You can also create an unlimited number of price levels.

Multiple use promotion

Promotions that can be used any number of times. Only one promotion code is required and used by all customers.

N

New subscription

New recurring revenue resulting from a subscription that is not a renewal of an existing subscription.

NetSuite as OIDC Provider

An authentication method for integrations. Outbound single sign-on method build on OAuth 2.0 authentication protocol.

NetSuite OneWorld

A solution for supporting global, multi-subsidiary organizations. With OneWorld, an organization can use a single NetSuite account to manage records and transactions for multiple legal entities, or subsidiaries, conducting business across multiple tax jurisdictions involving multiple currencies.

Netting

The deduction of one amount from another. For example, Subsidiary A owes Subsidiary B $5000.00. Subsidiary B owes Subsidiary A $4000.00. The netting amount due to Subsidiary B is $1000.00.

Nexus

A tax jurisdiction where you have a business or taxable presence. A nexus defines geographies in which you will collect and pay (indirect) taxes such as sales tax or VAT.

Non-inventory item

An item that does not represent physical inventory, but still represents something of value. For example, a service that is provided to customers.

Non-inventory part

An item you sell but do not keep in stock, such as an item that is custom made.

Note

A feature for keeping track of information about records. There are two types of notes in NetSuite:

- System notes - Generated automatically when changes are made to a record.
- User notes - Created manually to keep track of information about a record.

O

OAuth 2.0

A robust, industry standard-based mechanism that increases overall system security. This authentication mechanism enables client applications to access NetSuite through APIs, eliminating the need for RESTlets or REST web services integrations to store user credentials.

Onboarding Checklist SuiteApp

A comprehensive tool for creating templates and checklists that simplifies the onboarding process for newly hired or transferred employees.

On-hand quantity

The amount of inventory available for a particular item.

One Stop Shop (OSS)

A feature that supports the One Stop Shop (OSS) taxation scheme for the supply of physical and digital goods and digital services to non-VAT registered customers in the European Union.

One Stop Shop (OSS) Country

The country that your customer uses for their shipping address, as indicated on the transaction's Shipping subtab. This field only appears on transactions with an OSS Distance Sale tax type. If the Tax Details Override box on a transaction is checked, you can manually select an OSS country.

One Stop Shop (OSS) Distance Sale

The tax transaction type that is used to identify OSS transactions.

One Stop Shop nexus

The nexus where your company is registered for the One Stop Shop (OSS) taxation scheme.

One Stop Shop (OSS) Scheme

The One Stop Shop scheme for a transaction. The SuiteTax Engine automatically determines the One Stop Shop scheme based on your One Stop Shop setup and the details in each transaction. This field only appears on transactions with an OSS Distance Sale tax type. If the Tax Details Override box on a transaction is checked, you can manually select an OSS scheme.

One Stop Shop (OSS) Tax Schedule

A tax schedule that is optional. OSS tax schedule is only needed when you need to use a tax code that is different from the nexus default tax codes for OSS distance sale.

Online price

The price shown with an item in your web store. You enter this price on the item record.

Opening balance

The first balance you enter when you set up a NetSuite account. This value can be entered during initial setup or later by clicking Enter Opening Balances on the Transactions page. Balances can be entered manually or imported from other accounting software.

Optimal fulfillment strategy

The method by which the most favorable location is assigned to a sales order line. The optimal fulfillment strategy is based on the selected location types, geographical restrictions, and the minimize fulfillment locations option in a rule.

Option forecast

A dependent demand for an item. Typically, the item is an optional component of a Model Bill of Material for an item and is dependent on the forecast for the item. Percentages are used with the end-item forecast to estimate the mix of optional components and generate the option-level forecast.

Order fulfillment

The steps and processes through which an order passes, typically between the moment it is approved and when it is delivered to the customer. The steps in the order fulfillment process can include acknowledging a fulfillment request for an order, preparing and packing the items in the order, shipping the order to the customer, and recording the item fulfillment in NetSuite.

Order promotion

A promotion that applies discounts to the order total of a transaction.

Order type

A category that associates attributes to sales and transfer orders.

For example, you can create an order type for rush orders.

Order quantity

The quantity on order for a given period for an item.

P

Packing orders

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The second step of order fulfillment. Packed items have been packaged to be shipped to the customer. A packing fulfillment is a non-posting transaction.

Parent item

Any item in NetSuite that has a child item connected to it. For example, Christy's Catering might offer a parent item called breakfasts with child items of scrambled eggs, fresh fruit, and bagels.

Parent String

A parent string is a type of a string in the string hierarchy available in Manage Translations UI. A parent string provides its description and translations to its child strings. It can be created either in UI or in SDF as a part of a Translation Collection. It is included in a collection and it can be edited except for its collection.

Partner

An outside company you have a business relationship with who is not a customer or a vendor.

Partner Center

A NetSuite space where partners can log in to update their profiles, view reports, and set up promotion codes.

Past due forecast days

A preference that controls the number of days the system will consider a forecast quantity for consumption, after the period has passed.

Paycheck Journal

A feature that enables you to use SOAP web services to build integrations between NetSuite and existing payroll solutions, use SuiteScript to build custom payroll solutions, and customize payroll forms and fields.

Payment Services Directive 2 (PSD2)

A revised directive that regulates payment services and payment service providers throughout the European Union and European Economic Area.

Payroll forms

The various tax forms that a business must file to comply with federal, state, and local laws. In NetSuite you can print the Employer's Quarterly Federal Tax Return (941), the Annual Employer's Federal Unemployment Form (940), W-2 Wage and Tax Statement, and the Form 1099 MISC Miscellaneous Income.

Payroll item

A default setup used to calculate payroll for each employee. The basic information for each payroll item consists of a name, a payroll item type, and a corresponding W-2 box. You can set up payroll items for many types of withholding and company contributions by selecting them from the up-to-date tax tables in NetSuite.

Payroll journal

A record of all paychecks your company has written. This report is shown in debit/credit form, is listed by employee, and has totals for each column at the end of the report.

Payroll liability

An obligation to pay an amount to employees or on behalf of employees. A liability appears on your balance sheet and is owed to people outside the business, such as tax agencies, insurance companies, or your employees.

Pegging

A feature that links demand to incoming supply. You can create a peg chain between a supply transaction and a demand transaction from either side. Demand transactions can peg to supply transactions and supply transactions can peg to demand transactions. The supply planning process populates pegging data.

Pending

A business event status indicating that the handler associated with the event has not yet started.

Percent variance

A percentage change which is calculated by comparing Amount with Amount (for Comparison). The formula is: {[Amount — Amount (for Comparison)] / Amount (for Comparison)} * 100. For example, if Amount = $ 500 and Amount (for Comparison) = $ 400, there was a 25 % increase in the figure.

Percent of total

An option available for certain default columns and columns added to reports, when customizing a report. Check this option to add a column to the right of the column where you select this option. The new column calculates the percent of total by dividing the amount by the grand total of the amount column.

Performance metric

Existing NetSuite data that is attached to a goal to track your progress toward completing the goal. For example, the performance metric "New Customers" tracks how many new customers you have won since the start date of your goal. A part of the Performance Management feature.

Performance review

A record that evaluates your own job performance or the job performance of your direct reports. Performance reviews are based off of a template that includes instructions, questions, and a rating scale. A part of the Performance Management feature.

Performance review questions

The questions that you include in performance reviews. You can create questions that are text only or that require both text and a rating. Different ratings are defined in rating scales. A part of the Performance Management feature.

Performance review rating scale

A set of terms that can be applied in response to questions in performance reviews. For example, a rating scale might include the terms Exceptional, Exceeds Expectations, Meets Expectations, and Does Not Meet Expectations. These terms can help you to evaluate your performance or the performance of your direct reports. Rating scales include numeric values and descriptions for each term. A part of the Performance Management feature.

Performance review schedule

A set of performance reviews that you launch for a group of employees, based on employees' subsidiary, department, location, or job title. A part of the Performance Management feature.

Performance review template

A grouping of performance review questions, rating scale, and instructions that can be applied to different performance reviews. A part of the Performance Management feature.

Personal Information (PI) Removal

A feature that enables NetSuite users with the appropriate permissions to remove personal information from NetSuite fields, records, and audit logs. The main purpose of PI removal is to help customers comply

with General Data Protection Regulations (GDPR), especially the right to be forgotten and keep personal information private.

Personalized catalog view

The view of the web store catalog that is visible to a customer segment.

Phantom Assembly

A non-stocked assembly that lets you group together material needed to produce a subassembly. Phantom assemblies avoid the need to create multiple work orders and also works as a build-to-order instruction. Phantom assemblies are built at the same time as the higher level assembly.

Picking orders

The first step of order fulfillment. Picked items have been pulled from inventory and are waiting to be packed and shipped to the customer. A picking fulfillment is a non-posting transaction.

Picking ticket

An itemized list of a sales order used to assemble a customer's order before shipping.

Pick strategy

A record that contains filters and zone priority settings applied by NetSuite WMS to the backend process that sorts and determines the recommended bin for picking.

Pick task

A record that captures picking and staging details of items that you process from a mobile device. NetSuite WMS generates item fulfillment records from completed pick tasks.

Plan definition

The definition of a supply plan, which includes a name and the parameters to be referenced by the system, that will control the system's behavior. This plan also serves as a reference for accessing the results of a supply planning run, so that multiple plans can be generated, compared, analyzed, and so on.

Plan type

There are two plan types, the Master Production Schedule (MPS) and the Material Requirements Plan (MRP). Plan type is part of the Plan Definition.

Planned order

A work order, purchase order, or transfer order suggested by the planning engine. Planned orders can be in firmed or released status. Firmed Planned Orders are not deleted by a subsequent planning run. Released Planned Orders are transformed into actual work orders, purchase orders or transfer orders in the NetSuite.

Planning horizon

The length of time that the planning system considers during a run. The planning horizon is designated in the plan definition as a number of days. The system calculates the start date as the current date, and the end date as the current date plus the number of days from the plan definition. For example, if the plan start date is June 1 and the horizon is 30 days, the end date will be June 30.

Planning repository

A process that stores related planning information that enables you to control how often NetSuite updates planning inputs. The repository refresh process accumulates the most up-to-date data from NetSuite to use for supply planning. The planning process calculates projected available quantity, generates supply orders, action, and exception messages.

Planning rule

Rules that are designated in the Plan Definition. They define how an item is sourced, whether it is made at a manufacturing plant, purchased from a supplier, or transferred from another plant. This information is critical for multi-location planning.

Planning scope

A scope that is designated in the Plan Definition. It determines which locations will be included in the plan and the demand sources for each location.

Planning time fence

A point in time in the planning horizon that acts as a boundary. Within this boundary, any changes to the schedule may adversely affect component schedules, capacity plans, customer deliveries, and cost. Within the planning time fence, the planning system will not create planned orders. Instead, Exception Messages will be created to inform you that a projected negative balance exists within the time fence.

Portlet

A dynamic data display window in a NetSuite tab or dashboard. Some portlets provide direct access to raw data, whereas others display data that has been synthesized into critical business metrics, such as key performance indicators (KPIs), performance scorecards, trend graphs, and report snapshots.

Preferences

Options available in NetSuite to make the application function according to your business needs. Preferences are unique to each feature area and are based on your role. You can set preferences that only affect your personal experience of NetSuite, such as time zone, language, drop-down menus, and color theme. Depending on your role, you may also have permission to set company-wide preferences that affect areas such as accounting, invoicing, and inventory management.

Preferred location

The default fulfillment location for an item when it is added to a sales order.

The preferred location is set when the Location column is displayed in the Items sublist in the sales order form.

Preferred stock level

The optimum quantity to maintain in stock of an item. The ideal quantity is the amount you need to fulfill orders in a timely manner without either running out or overstocking.

Prepayment Account

The account that NetSuite selects by default when entering a new vendor prepayment transaction. This can be a new or existing account that is an Other Current Asset type.

Process manufacturing

A production process that adds value by mixing, separating, forming, and/or performing chemical reactions. For example, process manufacturing items can include food, chemicals, beauty products, and pharmaceuticals.

Product family

A group of products or services that pass through similar processing steps, have similar characteristics, and share common equipment prior to shipment or delivery to the customer. Can be from different overlapping product lines that are produced in one factory and often used in production planning (or sales and operations planning).

Projected available balance

An inventory balance projected into the future. It is the running sum of on-hand inventory minus requirements plus scheduled receipts and planned orders.

Projected gross requirements

The total of independent and dependent demand for a component before the netting of on-hand inventory and scheduled receipts, projected into the future.

Promotion

A feature used to apply a discount to a transaction when the transaction meets specified criteria.

Proof Key for Code Exchange (PKCE)

A security extension for OAuth. 2.0.

PSD2

Payment Services Directive 2. For more information, see the Glossary entry for Payment Services Directive 2.

Public client

A way to implement OAuth 2.0 without using client secret. You can choose to use public client on the integration record page.

Purchase Charge Rule

A project charge based rule which is driven by Purchase Orders (forecast charges) and Bills (actual charges). You can set it up with As Charge Revenue Rule to recognize revenue.

Purchase order

A purchase order (PO) is a document issued by a buyer committing to pay the seller for the sale of specific products or services to be delivered in the future.

▲

Q

Quantity available

Quantity On Hand less Quantity Committed.

Quantity back ordered

Quantity committed to sales for which there is no stock to fill the order.

Quantity committed

The number of units of an item reserved by unfulfilled sales orders.

Quantity on order

Quantity on approved purchase orders pending receipt from the vendor.

Quantity to order

Preferred Stock Level less Quantity Available.

Question library

The list view of your performance review questions. A part of the Performance Management feature.

QuickView

A summary view of a record in the user interface. For some record types, the QuickView also contains buttons that allow users to make changes to the record.

▲

R

Rank

The position of an item in a list of similar items. In a region, each location can be given a rank, which is used to determine the order in which locations are assigned to sales order lines when the optimal fulfillment strategy is set to Highest Ranked Location.

Real-time rate

The shipping rate provided directly from UPS or FedEx.

Recognition attribute

Fields in a revenue element that define how revenue is planned and recognized. The default values for recognition attributes are set on the Revenue Recognition/Amortization subtab of the item record.

Recognition treatment

A collection of values for recognition attributes. This record is part of the Rule-Based Recognition Treatment feature.

Recognition treatment rule

The criteria that determine whether NetSuite applies a recognition treatment to a revenue element.

Reconciliation Rules

Rules run by the Intelligent Transaction Matching feature to reconcile GL account transactions against imported bank data. As of NetSuite 2020.2, reconciliation rules consist of two rule types: matching and auto-create. Matching rules can be system- or user-defined and they enable you to automatically match imported data with existing account transactions in NetSuite. An auto-create rule is automatically generated when there is a manual one-to-one match that meets a specific set of criteria. Auto-create rules enable you to automatically create and match account transactions with imported bank lines. The combination of matching and auto-create rules automatically handles the bulk of your banking data, leaving you with minimal exceptions that require manual matching or posting.

Record Customization

A feature that provides a consolidated view of all business record types in NetSuite. You can view and maintain the record types in your account. You can also create new fields and sublists to include on a record.

Records Catalog

A cross-channel, contextual tool that provides all records available for use in NetSuite. Within the Records Catalog, you can find all available records, their fields, sublists, IDs, APIs, joins, and search filter fields for those records.

Recommended bin

The bin in your warehouse that NetSuite WMS selects for picking through a bin filtering and sorting process.

Reflection

Your final comments on a goal on the outcome of the goal for you or for your employee. On a performance review, the section that contains company-defined questions. A part of the Performance Management feature.

Region

A geographical area based on one or more countries, states (or counties or provinces), or postal codes. A region is defined in the region record.

Register

A list of transactions for a particular account. You can view the date, transaction type, number, and status from the register.

Release planned order

The planning system generates planned orders which are suggestions to the planner to resolve a projected negative balance in the supply plan. The planner can release the planned order, which transforms it from a planned order suggested by the planning system into a work order, purchase order or transfer order.

Relying Party

A term that stands for the authenticated party in the OpenID Connect (OIDC) terminology.

Reminders

A portlet that automatically appears on your NetSuite Home page each time you log in. The reminder list displays various matters of business to be taken care of. You can customize the list to display items specific to your daily routine, or you can turn it off completely. In NetSuite, Reminders can also be event reminders, which pop up at the time you designate on event records.

Reorder point

The point at which you should place an order to restock an item. If you select Inventory Level Warnings from Set Preferences on the Home page, NetSuite notifies you automatically when your inventory reaches the reorder point.

Replenishment method

A preference on the item, which designates how the item is to be replenished in Inventory. For example, order point, MPS, or MRP.

Resale number

The tax identification number issued by state, local, or federal governments and required by a vendor if you want to avoid paying sales tax on merchandise for resale. You can enter this number on the vendor record.

Resource

Equipment or meeting spaces your company uses for events. Examples of resources include phones, computers, projectors, vehicles, lab equipment, and conference rooms.

REST web services

A feature that provides an integration channel that extends the capabilities of SuiteTalk. REST web services provide a REST-based interface for interacting with NetSuite. You can integrate existing business functions within your organization to NetSuite through the use of REST web services. REST web services can be invoked in real-time to perform operations such as retrieving, adding, updating, and deleting data.

Revenue arrangements

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Transactions that record the details of customer performance obligations for purposes of revenue allocation and recognition. When enabled, the Advanced Revenue Management feature automatically creates revenue arrangements from predefined revenue sources, such as sales transactions, subscriptions, and projects.

Revenue elements

Records that correspond to individual lines in a source. Revenue elements are attached as lines on a revenue arrangement in Advanced Revenue Management.

Revenue recognition plans

Records that indicate the posting periods in which revenue should be recognized and the amount to be recognized in each period in Advanced Revenue Management. Revenue plans are derived from revenue recognition rules. Each revenue element has a forecast plan and one or more actual plans. The actual revenue plans control the posting of revenue.

Revenue recognition rules

Records that define patterns for revenue recognition in Advanced Revenue Management. They include, for example, the recognition method, amount source, and start and end date sources.

Revenue recognition schedules

Records that indicate the posting periods in which revenue should be recognized and the amount to be recognized in each period. Revenue recognition schedules are generated for sales transactions containing items that have associated revenue recognition templates. The records are part of the legacy Revenue Recognition feature.

Revenue recognition templates

Records that define how to post revenue when the legacy Revenue Recognition feature is enabled. These templates are used to generate revenue recognition schedules for associated items.

Reverse Charge

A tax type which moves the responsibility for reporting VAT from the seller to the buyer of goods or services. When you apply a reverse charge to a transaction, the buyer reports both input VAT and output VAT to their domestic tax authority. As a result, the reverse charge is neutral, but the tax authorities have full oversight of the transactions. In some countries, if the buyer is liable to pay the VAT on behalf of the seller, it must be clearly stated on the invoice.

Role

A set of permissions that gives access to specific areas of your data to employees, customers, partners, and vendors. Standard roles can be assigned to employees. User-restricted roles that provide access to a very limited set of tasks and a different Help Center can be assigned to employees, customers, partners, and vendors.

Rough cut capacity planning

A long-term capacity planning tool used to balance required and available capacity and to negotiate changes to the master schedule and/or available capacity.

Running balance

An option available for certain default columns and columns added to reports, when customizing a report. Checking this option adds a column (to the right side of the column you select this option for) containing a running balance.

S

SMT

For information, see the Glossary entry Site Management Tools

Safety stock

A measure of the amount of stock you want to keep on hand to account for variations in demand so that you do not run out. It is a buffer amount of an item you prefer to keep in stock at all times so that you do not run out.

Sales forecast

Predicted sales revenue for a period. NetSuite sales forecast reports include sales orders, invoices, cash sales, open estimates, and open opportunities. Sales forecast amounts in NetSuite can be weighted or projected.

Sales manager

A standard role that has permission to:

- Enter and change estimates and sales transactions
- Access customer records
- Approve commissions
- View A/R reports, sales reports and graphs, A/R register, non-posting registers, and items

Sales person

A standard role that has permission to create estimates, opportunities, and sales transactions; access customer records; view sales reports and graphs, non-posting registers, and items lists.

Sales order

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.

Sales tax agency

A vendor record for a taxing authority.

Sales tax item

A tax that you, as a vendor, collect from your customers at a certain rate and pay to one tax agency.

Sales tax payment

A remittance to a tax authority, which you have set up as a vendor. To track sales tax payments you make to the government on your customers' behalf, set up a sales tax vendor and sales tax items. You then use these items to add sales tax to invoices and cash sales receipts.

Scheduled downsell

A planned decrease in subscription revenue (for example, offering a reduced price as an incentive for renewing). This pricing schedule is negotiated at the beginning of a contract and is configured prior to activation.

Scheduled receipt

An open order that has an assigned due date. An open order can be a released manufacturing order, purchase order, or an unfilled customer order

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Scheduled upsell

A planned increase in subscription revenue (for example, reduced introductory pricing that is scheduled to increase after the first three months). This pricing schedule is negotiated at the beginning of a contract and is configured prior to activation.

Scriptable cart

A SuiteScript feature you can use to customize the order form you use for e-commerce customers.

Segment

A custom classification field used to classify records, similar to class, department, and location. You can define possible values for each segment and add the segments to specific record types.

Shipping address

The location to which an order must be shipped. A shipping address usually consists of a street name and number, town, zip code, and country.

If a shipping address is incomplete, depending on the rules in an automatic location assignment configuration, NetSuite might not be able to assign a fulfillment location to sales order lines with that shipping address.

Shipping capacity

The number of shipping orders that can be processed at a location. Automatic location assignment takes shipping capacity into account when assigning locations and does not assign more than the specified capacity. Shipping capacity can be defined in the following ways:

- Daily shipping capacity – Maximum number of orders that can be assigned to the location in one day.
- Total shipping capacity – Maximum number of shipping orders that can be pending fulfillment at the location.

Shipping capacity can be defined on the location record only.

Shipping integration

A feature that integrates your UPS or FedEx account with your NetSuite account, enabling you to print bar code shipping labels and allowing your shipping account to be charged when orders are fulfilled in NetSuite.

Shipping item

A delivery method for a shipping carrier. A shipping item describes how to ship an item and can include shipping rate information, handling rates, rules for shipping and handling, and specify when shipping is free. In NetSuite, shipping item is also referred to as shipping method and ship via.

Shipped order

The final step in the fulfillment process. Items on shipped orders have been shipped to the customer. A shipped fulfillment is a posting transaction.

Shortcut

A link to your most frequently used pages in NetSuite. On your home page you can customize shortcuts to link to the tasks you perform most often. You set them up by clicking the star icon on the tab to the left of the home tab.

Single use promotion

A unique coupon code, that can only be used one time by a single customer, provided to each recipient, allowing personalized promotional campaigns and email marketing.

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Site Management Tools

A graphical interface that lets you manage SMT-related content on your site. You can add, edit, or delete content. You can drag and drop the content from one defined area to another. This lets you view changes in real time on the unpublished version of your site. Only authorized users can manage content.

Site theme

An HTML template you can apply to your website to customize the look and feel.

SOAP web services

An extensible Markup Language (XML) application mapped to programs, objects, databases, or complex business functions. With SOAP web services you can integrate existing business functions within your organization to NetSuite through the use of SOAP web services. SOAP web services can be invoked in real time to perform operations such as retrieving, adding, updating and deleting data.

Solution

An answer or recommendation to a common customer question or problem. Solutions are organized under topics and published as a knowledge base. They can also be attached to case records for quick responses to customer messages.

Sourcing

A feature allowing you to set fields to source information from another record in your account. When a field is defined to source information from another record, the information populated into the field is then dependent on fields associated with a record selected on another field within that form. Some standard fields automatically source information and custom fields can be defined to source information as needed.

Sub-assembly

A unit assembled separately but designed to be incorporated with other units into a larger manufactured product.

SuiteScript Server Pages Applications

A feature that supports the packaging of SuiteCommerce website assets as SuiteScript Server Pages applications. You can create SSP applications to customize your e-commerce website. Deploy SSP applications to your site by selecting touch points that specify entry page URLs. This feature is available for both Site Builder and SuiteCommerce Advanced websites.

Supply planning

The component of supply chain management that determines how to best fulfill the requirements created from the demand plan. The objective is to balance supply and demand in a manner that achieves the financial and service objectives of the enterprise.

Supply planning workbench

The Supply Planning Workbench enables planners to view information about supply and demand orders within the supply plan. After reviewing the results, you can then take action to adjust your supply plan to ensure that customers receive their orders complete and on time. The workbench essentially, helps to guides planners on how they will execute their supply plans.

Supply required by date

An information that enables you to learn the date the order must be shipped to the customer. For these calculations, you identify a Supply Required By Date on demand order lines. Then, you can calculate allocation to determine which supply sources should be used to meet the demand on specific orders by the required date. This applies to demand created from customer orders, as well as demand from transfer orders and work orders.

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Stackable Promotions

A SuitePromotions feature that allows multiple promotions to be applied to one transaction.

Stand-Alone String

A stand-alone string is a type of string in the translation hierarchy available in the Manage Translations UI. A standalone string is created when a custom object or record is created and it is in turn deleted when the respective object or record is deleted. Therefore, the lifecycle of the stand-alone string is essentially connected to the lifecycle of the record. Stand-alone strings can neither be created nor deleted through the Manage Translations UI. They can be linked to a custom string and become a child string.

Standard parser

A pre-configured parser available through a SuiteApp. Unlike the default parsers, standard parsers can be configured in a format profile to configure bank data imports. SuiteApps that provide standard parsers include the following:

- Bank Statement Parsers SuiteApp, which includes OFX or QFX, BAI2, and MT940 file format. If you have a financial institution record set up for manual import, you can use the standard parsers available through the Bank Statement Parsers SuiteApp, or you can develop and use your own parsers.

- Bank Feeds SuiteApp, which provides you a financial institution and format profile record that you can configure to automate bank data imports. These records contain a standard parser and connectivity plug-in that enable you to directly connect to financial institutions in the United States, Canada, or Europe. To retrieve data from a financial institution outside of the United States, Canada, or Europe, you need to develop and use your own parser.

Standard promotion

A promotion that is not a SuitePromotions promotion, nor a shipping item, and not a promotion created with the Advanced Promotions bundle. Sometimes also called Core Promotions.

Standard role

A role that gives users internal access to your data. These roles can be assigned to employees. Standard roles are usually named for positions in your company. The predefined permissions and levels of access assigned to these roles are based on the positions. For example, the A/P Clerk role lets users enter bills and vendor credits, pay bills and sales tax, and view the A/P and inventory reports.

Static group

A group of relationship records created from the results of a one-time search or selected manually. To make changes to a static group, you must edit the group, and then add or delete members.

Status page

The status page indicates a process is under way or indicates how much of the process has been completed.

Store location

A location record in NetSuite whose location type is set to Store.

Store manager

A standard NetSuite role that has permission to:

- Enter or change purchase orders and sales transactions
- View inventory, store, and sales reports
- Edit customer, vendor, and company records
- Access all web store or website features

Subaccount

An optional subdivision or cost center of an account. Subaccounts allow more detailed tracking of financial transactions.

Subitem of

A field on an item record where you select the name of the parent item for the new item you are creating.

Submitted Hours

The total approved or pending approval hours for the selected period in the Time Entry Exception Report in the Weekly Timesheets feature. The Submitted Hours column is only available when the Advanced Approvals on Time Records preference is enabled.

Subtab

An element in the NetSuite user interface. Tabs appearing in the middle or at the bottom of a page are called subtabs.

SuiteAnalytics

A feature area that includes Dashboards, Workbook, NetSuite Analytics Warehouse, Searches, Reports, and SuiteAnalytics Connect.

- **Dashboards** – A center assigned to a user role to ensure maximum efficiency and ease when you use NetSuite.

- **Workbook** – A tool that combines datasets, tables, pivot tables, and charts, enabling you to analyze real-time and historical data from your account using multiple visualizations. Workbook leverages the analytics data source, which is designed to ensure consistent results across all workbook visualizations. You can create workbooks using predefined dataset or workbook templates, or custom datasets and workbooks that you define.

- **NetSuite Analytics Warehouse** – A tool that lets you blend your NetSuite data with data from other sources, and analyze it with a wide set of visualizations.

- **Search** –Tools that you can use to retrieve real-time data from your account. You can search for a single record by keywords, return a set of records that match filters you define, customize the display of search results, export results to other applications, email results to other users, and save search definitions for reuse.

- **Reports** – Capabilities that you can use to retrieve, present, and analyze real-time business results. You can run standard reports or modify them by setting per-user preferences, selecting per-report viewing options, or defining custom reports in NetSuite's Report Builder and Financial Report Builder tools.

- **SuiteAnalytics Connect** – Exposes NetSuite data for ODBC, JDBC, and ADO.NET access. This feature includes NetSuite drivers that you can download. With one of these drivers installed, you can use external applications to access views of NetSuite data and generate reports.

SuiteAnswers

Repository of Help Center topics as well as knowledge base articles, training videos, and best practices documents. Accessible from the Support tab in the NetSuite application.

SuiteApp

A collection of customization objects (such as custom forms, fields, and records), scripts, and saved searches that can be shared across NetSuite accounts. You can install a SuiteApp in your account or share it with other NetSuite customers. For example, an internal developer may create a SuiteApp that is first created and tested in a sandbox account before being installed in her company's production account. An Independent Software Vendor (ISV) may use SuiteApps to deliver solutions to customers.

SuiteBuilder

A set of features that provide a point-and-click interface for creating custom objects, such as fields, forms, record types, transaction types, segments, form layouts, and centers. These features allow you to adapt NetSuite to meet your company's business processes.

SuiteBundler

Bundles allowing NetSuite users to package together groups of objects for distribution to other accounts. These packages are called SuiteApps or bundles. SuiteApps authors may be internal developers creating customizations for their companies or independent software vendors (ISVs) distributing solutions to their customers. Two types of bundles can be created and made available for installation:

- A customization bundle is a group of custom objects that implement customized behavior in the NetSuite application.
- A configuration bundle is a group of NetSuite setup entries and preference settings.

> **ⓘ Note:** SuiteBundler is still supported, but it will not be updated with any new features.
>
> To take advantage of new features for packaging and distributing customizations, you can use the Copy to Account and SuiteCloud Development Framework (SDF) features instead of SuiteBundler.
>
> Copy to Account is an administrator tool that you can use to copy custom objects between your accounts. The tool can copy one custom object at a time, including dependencies and data. For more information, see the help topic Copy to Account Overview.
>
> SuiteCloud Development Framework is a development framework that you can use to create SuiteApps from an integrated development environment (IDE) on your local computer. For more information, see the help topic SuiteCloud Development Framework Overview.

SuiteCloud Development Framework (SDF)

A development framework that you can use to create SuiteApps and customizations for your NetSuite account from an integrated development environment (IDE) on your local computer, and deploy them to your NetSuite accounts.

SuiteCommerce

For information, see Glossary entry for Commerce Solutions.

SuiteFlow

A tool that you can use to automate business processes using visual workflow management. You can use SuiteFlow to create workflows that track the states of records of a selected type throughout a business process and perform specified actions when records reach different states. You can model workflow states, transitions between states, and actions in a workflow diagrammer.

SuitePeople

A comprehensive and integrated Human Capital Management (HCM) solution. SuitePeople eliminates repetitive and manual processes by providing one source for employee data. SuitePeople consists of two main modules: SuitePeople HR and SuitePeople U.S. Payroll.

SuitePeople HR empowers employees and managers with self-service functionality to complete most everyday tasks. SuitePeople HR leverages NetSuite to provide customizable workflows tailored for how

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you do business. SuitePeople U.S. Payroll is a full-service payroll solution that is fully integrated into NetSuite HR and Accounting modules.

SuitePromotions

A set of promotions featuring the latest promotions enhancements including Stackable Promotions, Auto-Apply Promotions, Best Offer, improved performance and a new improved user interface.

SuiteScript

The scripting platform for NetSuite solutions. It includes custom code capabilities that operate within the client/browser framework, as well as server-side scripting capabilities that can be scheduled or event-based and operate within the server framework.

SuiteScript Server Pages

A feature that supports the packaging of SuiteCommerce website assets as SSP applications. You can use SSP applications to customize your e-commerce website. Deploy SSP applications to your site by selecting touch points to specify URLs where website visitors can interact with SSP application pages.

SuiteTalk

A feature that provides programmatic access to your NetSuite data and business processes through SOAP and REST web services. Generally speaking, the SuiteTalk Platform has the following characteristics:

- SOAP web services support integration to NetSuite using Java, .NET, or any other development languages running on SOAP-based clients.
- REST web services provide integration to NetSuite from any platform that supports the REST architecture style, including broad support for CRUD operations.
- Support for account-specific customizations based on custom records, fields, and business logic.

SuiteTax

A feature which provides greater flexibility to support specific country needs and legislation changes regarding tax calculation and reporting. For example, SuiteTax helps you manage in-country transactions (sales tax, VAT or GST), and numerous special tax situations and rules, such as intra-EU transactions, 3PL, reverse charges, and others. SuiteTax also lets you use different tax calculation engines for nexuses and override tax details on transactions.

Support manager

A standard role that has permission to:

- Set up case assignment and escalation
- Create online case forms
- View and edit issue and case records
- View support and sales reports

Support person

A standard role that has permission to:

- View and edit issue and case records
- View case and issue reports

Synthetic fields

Additional fields that are not exposed to SuiteScript or in the NetSuite user interface. You can use synthetic fields in scriptable email templates and in field sets for SuiteCommerce Advanced websites.

System rules

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Built-in reconciliation rules that automatically match imported bank data with account transactions in NetSuite. System rules include the following and are prioritized in the following order:

- Match on Transaction Number and Amount
- Match on Amount and Transaction Number without Prefixes and Leading Zeros
- Match on Amount when Date is within 90 Previous Days

System rules cannot be edited or removed. However, they can be deactivated.

T

Tags

A SuiteCommerce Site Builder uses proprietary website tags and attribute tags for website customization.

Telephony Application Programmers Interface

A feature built into Microsoft Windows enabling windows applications to make outbound telephone calls.

Tab

An element that displays a page of the user interface in NetSuite. Tabs are in a bar at the top of the page. Note that the tabs appearing in the middle or at the bottom of a page are called subtabs.

Depending on the features in your NetSuite account, you can create new tabs to publish in your NetSuite center. You can also create website tabs to display website pages.

Task

A record used to track work you plan to finish before a certain due date, such as an action item to complete, an email message to send, or a call to make. You can create tasks for yourself or you can be assigned tasks by others.

Tax agency

The entities to whom you must remit the taxes you have collected on your transactions. In NetSuite, they are treated as a special category of vendors within the system.

Tax code

The basis by which the appropriate tax rate is applied to transactions. The tax code is usually based on information provided by the tax agency in the country or nexus you transact in.

Tax item

A tax that you, as a vendor, collect from your customers at one certain rate and pay to one tax agency.

Tax payment

Payments you make to the government on your customers' behalf. To track sales tax payments, you must set up a sales tax vendor and sales tax items. You then use these items to add sales tax to invoices and cash sales receipts.

Tax table

Computations for payroll tax withholding and some state sales tax charges. These are precalculated by NetSuite and always updated to conform to changing government regulations.

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TBA

Token-based Authentication. For more information, see the Glossary term Token-based Authentication.

Templates

You can use templates in various areas of NetSuite:

- You can use templates to generate messages such as email and letters.
- You can use marketing templates for email campaigns, online form notifications, and to create custom online forms.
- You can create templates for online custom record entry forms.
- You can use item/category templates to customize the look and feel of your Site Builder website. These templates are made up of a combination of HTML and NetSuite website tags.
- You can use template files installed by a Reference Implementation to define the presentation layer of a SuiteCommerce Advanced website. Note that some Reference Implementations are also available for Site Builder websites.

Termination Category

Part of the Termination Reason Tracking feature. A termination category can either be voluntary or involuntary. A voluntary termination indicates that the employee ended their employment, and an involuntary termination indicates the company ended the employment.

Termination Regretted

Part of the Termination Reason Tracking feature. A regretted termination indicates that the company regards the termination as a loss, where a non-regretted termination indicates the opposite.

Theme skin

A skin is a group of elements designed to compliment each other. A theme can contain multiple skins. You can quickly change the appearance of your site by applying a different skin.

Third-party logistics

The storage, fulfillment, and distribution of goods, manufactured or sold by your company, through an external service provider.

Tiered promotions

A promotion that has two or more levels of discounts in the same promotion. This means different amounts or rates of discount can be applied when different quantities of an item are added to a transaction.

Time-off change

A record that details changes to employees' time-off balances. Time-off changes can be recorded automatically or created manually.

Time-Off Management

A SuitePeople HR feature that enables Human Resources to define and manage time-off plans according to company policies and assign them to employees based on location, department, class, or (with NetSuite OneWorld) subsidiary.

Time-off plan

Part of the Time-Off Management feature. Time-off plans contain the time-off types and time-off rules that reflect your company's time-off policies.

Time-off reports

Part of the Time-off Management feature. Allows you to retrieve, present, and analyze your off-time data.

Time-off rule

Part of the Time-Off Management feature. Time-off rules define how to handle time-off eligibility, accruals, and carryover during an employee's tenure with the company.

Time-Off Tracking

A SuiteApp that enables employees to make time-off requests within their Employee Center role.

Time-off type

Part of the Time-Off Management feature. Time-off types define the different categories of time-off that employees are entitled to take. For example, vacation and sick leave.

Time-phased

The technique of expressing future demand, supply, and inventories by time period. Time phasing is one of the key elements of a planning system.

Time tracking

The process of recording billable hours. In NetSuite, you manually enter a time transaction that includes employee, customer, type of service, and duration. Then you can choose this as an item to be included on an invoice.

Token-based Authentication (TBA)

A robust, industry standard-based mechanism that increases overall system security. This authentication mechanism enables client applications to use a token to access NetSuite through APIs, eliminating the need for RESTlets or web services integrations to store user credentials.

Topic

A heading or category to use for organizing solutions in a knowledge base.

Total demand

The sum of all demand less item forecast (independent demand), option forecast (dependent demand), and actual demand (sales orders). This is one of the calculations used within the MPS process.

Total shipping capacity

The maximum number of shipping orders that can be assigned to a location at any one time, regardless of when the shipping orders were assigned or for how long they have been assigned. When the number of shipping orders assigned to a location is equal to the total shipping capacity, automatic location assignment stops assigning orders.

Touch points

Entry points into a Commerce web store. SSP Applications require proper touch point setup for commerce web store domains, configurable on the domain record. For each touch point defined on an SSP application, NetSuite replaces all incoming links to the default URL with links to a page hosted by the SSP application. A single SSP application can be integrated at multiple touch points. You can define touch points on the SSP Application record by providing URLs. For each URL, you have the option of defining parameters.

Transformations

A feature that automatically transforms the data on a transaction record into the next record type in a transaction record life cycle. For example, a transformation can change a sales order into an invoice.

Transaction

A record of a business event. Many transactions record financial agreements between your business and its customers or vendors. Other transactions record business events such as inventory adjustments and assembly build transactions. Many transactions result in the posting of an amount to the general ledger (G/L). Those transactions that do not impact the G/L are called non-posting transactions.

Transaction – supply planning

An exchange or transfer of goods, services, or funds. In the context of planning, there are key transactions that must be extracted from the NetSuite execution system, in order to properly execute a supply plan. For example, sales orders, purchase orders, or work orders.

Transfer order

An order requesting the transfer of goods from one location to another.

Translation String

A translation string consists of a key (identifier), a source string and one or multiple translations of the source string.

Trial balance

A worksheet that shows the balance of each active account as of a specific date, usually the end of the month. The trial balance is used to test whether total debits equal total credits for all ledger accounts.

Turnover Analysis

Part of the Workforce Analytics feature. Turnover Anlaysis provides a high-level view of the employees who are leaving your company and the reasons they are leaving.

Two-Factor Authentication (2FA)

A feature allowing enforcement of a second level of security for logging in to the NetSuite user interface. Using 2FA can protect your company from unauthorized access to data. Certain roles and specific privileges require that users supply the second factor (a verification code) when logging in to NetSuite.

Type of account

A general category of financial transactions. In NetSuite, these are Accounts Payable, Accounts Receivable, Bank, Cost of Goods Sold, Credit Card, Equity, Expense, Fixed Asset, Income, Long Term Liability, Non-posting, Other Current Asset, Other Current Liability, Other Expense, and Other Income.

▲

U

Unconsumed forecast

The total forecast quantity remaining in past periods, that has not been offset by actual sales orders.

Unfulfilled sales order

A sales order that has been created in the execution system, but has not yet been shipped.

Upsell

An increase in subscription revenue resulting from an increase in rate or quantity for a given service line item (for example, a quantity of 20 increased to 25).

Upsell item

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An item chosen for sale based on a customer's prior purchases. An item's upsell potential is measured by correlation.

User

A customer, contact, partner, vendor, or employee who is assigned access to the data in your NetSuite account. The level of access depends on the role you assign to the user.

User-restricted role

A role that gives customers, employees, and vendors external access to your account so they can view or enter their transaction information. When logged in with these roles, users can complete only a limited set of tasks. For example, the Employee Center role lets employees enter and view time reports, expense reports, and purchase requests.

User rules

A reconciliation rules that you define or generate, which include matching and auto-create rules. User rules were previously called custom rules.

Matching rules enable you to automatically match imported bank data with existing account transactions in NetSuite. You can add your own matching rules on the Reconciliation Rules page. Each matching rule can include multiple conditions.

Auto-create rules enable you to automatically create and match GL account transactions with imported bank lines. Unlike matching rules, auto-create rules are not added from the Reconciliation Rules page. Instead, they are automatically generated on the Reconciliation Rules page during the matching process, provided that certain criteria are met. An auto-create rule can only have one condition.

You can assign the order in which NetSuite runs matching and auto-create rules. Unlike a system rule, a user rule can be deleted.

V

Vendor bill variances

The Advanced Receiving feature enables you to enter vendor bill variances and generate journal postings to variance accounts. These variances can be based on quantity, price, or exchange rate discrepancies.

Vendor Center

A user-restricted role that has permission to:

- View purchase orders
- View accounts payable registers
- View non posting registers

Vendor Prepayment

A deposit paid to your vendors before they accept a purchase order for a good or service. The prepayment amount is applied against open bills for the vendor during the vendor prepayment application process. A vendor prepayment is a posting transaction in NetSuite.

Vendor Prepayment Application

The process of applying a vendor prepayment to one or more open vendor bills. During the application, the vendor prepayment account is credited, and the Accounts Payable account is offset.

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Vendor Prepayment Voucher

Detailed and printable information about the prepayments authorized for your vendors. You can print and email vouchers for the vendor prepayments you make.

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W

Warehouse

A location or building in your organization at which goods are received, stored, fulfilled, and distributed by you to customers, business partners or other locations. Inventory levels at warehouses are typically higher than levels at retail locations.

Warehouse location

A location record in NetSuite whose location type is set to Warehouse.

Wave

A transaction that consolidates sales or transfer orders that you want to release to the warehouse. When you release a wave, the items from the order become available for picking on a mobile device and further fulfillment processing. Released waves display pick tickets and pick tasks generated from items in the orders, as well as status updates that enable tracking of fulfillment tasks.

Web Service Change

A change to employee information made through SOAP web services.

Weighted total

The weighted total of a transaction represents the product of the transaction probability and the amount on the transaction. For example, an estimate with an amount of $1,000 that has a 50% probability of conversion has a weighted total of $500. Pipeline reports and forecast reports include weighted totals.

Win/loss reason

A description of the reason an opportunity is won or lost. You can select the reason you won or lost an opportunity in the Win/Loss Reason field on the opportunity record.

Workforce Analytics

A SuitePeople HR feature that compiles data and converts it into rich HR metrics, which enables you to measure and analyze company headcount, hiring, and turnover trends.

Work Calendar Timesheets

A Weekly Timesheets feature. The total expected timesheets during the selected time period based on the employee's work calendar in the Time Entry Exception Report.

Work queue

The orders assigned to a location and awaiting fulfillment.

Work capacity

A measure of the number of orders that can still be processed at a location at a specific point in time. Work capacity increases and decreases in proportion to the number of orders processed for shipping and the orders assigned to the location by automation location assignment.

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Work order

A work order is a task or a job, that can be scheduled or assigned to someone. In the context of planning, a work order is an order requesting the production of a quantity of product, to be completed on a specific date.

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Z

Zone

An area in your warehouse where you putaway, store, or pick items. In NetSuite WMS, you can associate zones with warehouse locations and bins.

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Glossary

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