ORACLE NetSuite

NetSuite Basics

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Table of Contents

NetSuite Basics 1
NetSuite Basics Overview 2
Getting Help 3
- NetSuite Documentation Overview 3
  - ERP Documentation Summary 4
  - CRM and SFA Documentation Summary 5
  - Commerce Documentation Summary 5
  - SuiteCloud Platform Documentation Summary 6
  - SuiteAnalytics Documentation Summary 7
  - SuiteApps Documentation Summary 8
  - Account Administration Documentation Summary 9
  - OneWorld Documentation Summary 10
  - Country-Specific Documentation Summary 10
- Accessing the Help Center 11
- Using the Help Center Window 11
- Submit Feedback for Help and Search 12
- Help Topic Navigation 13
- Searching for Help 13
- Getting Field-Level Help 14
- NetSuite Guided Learning 14
- FAQ: NetSuite Guided Learning 17
- Finding Out What's New in NetSuite 18
- SuiteAnswers Overview 19
  - Support Cases in SuiteAnswers 21
  - NetSuite Expert in SuiteAnswers 23
  - SuiteAnswers FAQ 28
  - NetSuite Virtual Support Assistant 30
  - Generating a HAR File for Troubleshooting 32
- NetSuite Support 33
  - NetSuite Issue Resolution 35
  - Support Phone Menu Routing Options 36
  - NetSuite Support Login 36
- Advanced Customer Support 37
  - Advanced Customer Support Services 38
  - Advanced Customer Support Playbooks 38
  - Advanced Customer Support Resources 40
- NetSuite Communities (User Groups) 41
- SuiteSuccess 41
- Voting for Enhancements 42
- Checking NetSuite System Status 43
- Finding Your NetSuite Release Version 45
- Oracle Help Center 45

Navigating NetSuite 47
- Finding Your NetSuite Account ID 47
- Header and Menus 47
  - Navigation Menu 48
  - Roles and Accounts 49
- Centers 53
  - Pages Common to all Centers 54
- Dashboards 57
- Global Search 59
- Create New Menu 59
- QuickViews 60

Keyboard Shortcuts 61
Popup and Dropdown Lists 63
Buttons and Menus in NetSuite 66
Text Enhance 68
Logging in to NetSuite 73
Logging in to the NetSuite UI 73
Supported Browsers for NetSuite 74
Your User Credentials 75
Finding Your Settings Portlet 75
Change Email Link 77
Change Password Link 78
Active Sessions 81
Setting Up Security Questions 81
Update Security Questions Link 83
If You Forget the Answers to Your Security Questions 84
Getting Access When You Forget Your Password 85
My Login Audit Portlet 86
Logging In Using Two-Factor Authentication (2FA) 88
Set up Your Preferences for Two-Factor Authentication (2FA) 88
Using 2FA 93
Logging out of NetSuite 98
Setting Personal Preferences 99
General Personal Preferences 100
Choosing a Language for Your NetSuite User Interface 107
Mapping Addresses on Records and Transactions 109
Personal Preferences for Appearance 109
Personal Preferences for Transactions 112
Analytics Personal Preferences 113
Report by Period: Financials Only Reports 116
Personal Preferences for Activities 117
Personal Preferences for Alerts 118
Receiving Email Alerts 119
Personal Preferences for Telephony 120
Personal Preferences for Restricting Views 121
Using SuiteAnalytics Workbook 123
Workbooks and Datasets 124
Sharing Workbooks and Datasets 124
Workbook and Dataset Templates 125
Working with Records, Transactions, and Lists 126
Working with Records 126
NetSuite Record Pages 128
NetSuite Record Types 131
Searching for Records 132
Viewing and Editing Records 133
Currency Field Limitations 134
Creating a Transaction from a Record 134
Attaching Files to Records 135
Inactivating Records 136
Duplicate Record Detection 136
Merging or Deleting Duplicate Records 138
Merging Large Numbers of Records 142
Merging Different Types of Records 144
Near Match Detection 145
Words Excluded from Duplicate Detection Matching 146
Working with Groups 148

Creating a Dynamic Group 149
Creating a Static Group 151
Creating a Contact Group 152
Adding and Removing Members of Groups 154
Working with Transactions 155
Creating Transactions 156
Entering Transaction Line Items 161
Entering Relationships on a Transaction 163
Entering Communication Information to a Transaction 163
Tips for Working with Transactions 164
Finding Transactions 166
Voiding, Deleting, or Closing Transactions 168
Memorized Transactions 170
Preferred Transaction Delivery on Customer and Vendor Records 178
Transaction Detail Report 183
Transaction Detail Workbook Overview 184
My Transactions Workbook 185
Limits for Display of Transaction Lists and Sublists 187
Working with Lists 189
Exporting Lists 190
Using Inline Editing 191
Using the Recent Records Menu 193
Working with List Views, Sublist Views, and Dashboard Views 194
Working with Your Calendar and Activities 201
Using Your Calendar 201
Setting Your Calendar Time Zone 202
Setting Calendar Preferences 202
Sharing Your Calendar with iCal-Compatible Devices and Applications 204
Navigating Your Calendar 207
Synchronizing Your Calendar 208
Working with Events 209
Scheduling Events 210
Sending Event Invitations 213
Setting Up Recurring Events 214
Using Resource Records on Events 215
Tracking Time for Events 217
Responding to Event Invitations 218
Setting Up Event Reminders 219
Canceling or Deleting Events 221
Searching Event Records 222
Working with CRM Tasks 223
Creating CRM Task Records 224
Tracking Time on CRM Tasks 226
Tasks and Project Tasks Portlets on Your Dashboard 227
Working with Phone Calls 228
Making Calls From NetSuite 229
Scheduling or Logging Phone Calls 230
Tracking Time on Phone Calls 231
Working with Email 233
Sending Email from NetSuite 233
Sending Email from Records 234
Requesting Read Receipts 236
Sending Email Directly from Lists and Records 237
Sending Search and Report Results Email 238
Attaching Files to Email Messages 238

Customizing Email Signatures and From Fields 238
File Cabinet Overview 241
File Cabinet Page Overview 242
Searching for and Viewing Files in the File Cabinet 243
Permissions and File Cabinet Files 244
Preferences on File Records 244
File Cabinet Folders 246
Creating File Cabinet Folders 246
Creating a Shortcut to a File Cabinet Folder 247
Restricting Access to File Cabinet Folders 248
Deleting Folders from the File Cabinet 249
Working with Files 250
Uploading Files to the File Cabinet 250
Editing Files in the File Cabinet 253
Moving and Copying Files in the File Cabinet 255
Downloading Files from the File Cabinet 256
Deleting Files from the File Cabinet 256
File Types Recognized in the File Cabinet 257
Exporting Reports, Searches, and Lists 260
Limitations on Exports to PDF 262
Limitations on CSV Exports of Data with Special Characters 262

NetSuite Basics

- NetSuite Basics Overview
- NetSuite Features That Use AI
- Getting Help
- Navigating NetSuite
- Logging in to NetSuite
- Setting Personal Preferences
- Using SuiteAnalytics Workbook
- Working with Records, Transactions, and Lists
- Working with Your Calendar and Activities
- Working with Email
- File Cabinet Overview
- Exporting Reports, Searches, and Lists

NetSuite Basics Overview

The major sections of NetSuite Basics are as follows:

- NetSuite Features That Use AI
- Getting Help
- Navigating NetSuite
- Logging in to NetSuite
- Setting Personal Preferences
- Using SuiteAnalytics Workbook
- Working with Records, Transactions, and Lists
- Working with Your Calendar and Activities
- Working with Email
- File Cabinet Overview
- Exporting Reports, Searches, and Lists

Getting Help

NetSuite offers many resources to help you when you need it. From self-service tools like the Help Center and SuiteAnswers to NetSuite customer support and training, you can always find answers to your questions.

Watch the following video for a quick introduction to using the Help Center, Field-level help, SuiteAnswers, and NetSuite Support.

Documentation Overview

The following resources are available:

Documentation Resources

- NetSuite Documentation Overview - a list of NetSuite Help Center resources.
- - a library of Help Center videos that work alongside the Help Center content to make difficult tasks easier.
- User Guides - all of the Help Center content provided in PDF format.
- Developer Documentation - a summary of the resources NetSuite provides for SuiteCloud and Commerce developers.
- SuiteAnswers Overview – a description of the resources offered in SuiteAnswers.
- Using the Help Center Window - tips and tricks to help you use the NetSuite Help Center effectively.
- Searching for Help - a description of the search tools you can use to find the help you need.
- Getting Field-Level Help - an explanation of help provided for each field on NetSuite pages.
- Training Resources - an extensive on-demand library in the SuiteAnswers Learning Center, training and feature videos in the Help Center, and Oracle video hub.

For more information about contacting NetSuite Support Services, see Support Cases in SuiteAnswers and NetSuite Support.

Note: For more information and resources, see the help topic Getting Help for Administrators. This page is only visible for administrator roles.

NetSuite Documentation Overview

The NetSuite Help Center is organized into sections corresponding to different NetSuite functions.

Some tasks in NetSuite are common to most users, no matter the functional area in which they work. These tasks are covered in NetSuite Basics. For an outline, see NetSuite Basics Overview.

These topics cover specific NetSuite product areas, including what you can do in each area and links to corresponding documentation:

- ERP Documentation Summary
- CRM and SFA Documentation Summary
- Commerce Documentation Summary
- SuiteCloud Platform Documentation Summary

The following topics list the documentation for activities that aren't specific to one product area:

- SuiteAnalytics Documentation Summary

- SuiteApps Documentation Summary
- Account Administration Documentation Summary
- OneWorld Documentation Summary
- Country-Specific Documentation Summary

Many help topics also are available as User Guides in PDF format that you can view and print. You can find them in the User Guides section of the Help Center. For more details about using the NetSuite Help Center, see Using the Help Center Window.

In addition to the Help Center, SuiteAnswers provides support knowledge base articles, training videos, and best practices information. For more information, see SuiteAnswers Overview.

ERP Documentation Summary

Enterprise Resource Planning (ERP) in NetSuite covers several areas of your business such as accounting, inventory, order management, project management, and employee management. The following help is available for ERP in NetSuite:

Accounting	The accounting area includes the following chapters: ▪ accounting periods ▪ bookkeeping ▪ banking ▪ currencies ▪ journal entries ▪ managing the chart of accounts in NetSuite ▪ financial statements and accounting reports ▪ revenue recognition ▪ taxes ▪ fixed assets management ▪ statistical accounting ▪ multi-book accounting For information about accounting topics, see the help topic NetSuite · Accounting. Several accounting-related user guides are also available for download from the User Guides help topic.
Items and Inventory	For information about setting up inventory management, item records, shipping methods, bar coding, manufacturing, and more, see the Inventory Management Guide, available from the User Guides help topic, and the help files located in the Item Record Management and sections.
Customer Order Management	For more about customer order handling, including placing orders, fulfilling orders, and billing, see the help topic NetSuite · Order Management.
Purchasing and Receiving	For information about purchase order management, including vendor records, bills and payments, requisitions, approval routing, and expenses, see the help topic Vendors, Purchasing, and Receiving.
Project Management	To learn about using NetSuite to manage your project tasks and resources, see the help files in the Projects section.
Employee and Payroll Management	For information about managing employees and using NetSuite for payroll, see the help files in the Employee Management section. You can learn about SuitePeople Overview,

	NetSuite's integrated Human Capital Management (HCM) solution. These topics also include information about time tracking, expense reporting, and purchase requests.

CRM and SFA Documentation Summary

Customer Relationship Management (CRM) and Sales Force Automation (SFA) with NetSuite includes sales, marketing, partners, and support management. The following help is available for CRM and SFA in NetSuite:

Customer Service & Support	For information about setting up case management including case types, origins, and more, see the help topic Setting Up Case Management. For information about working with cases including creating, escalating, tracking time, and more, see the help topic Working With Cases. For information about issue management including statuses, severities, reproducibility, and more, see the help topic Issue Management. For information about the knowledge base including creating topics, solutions, and more, see the help topic Knowledge Base. For information about monitoring support performance including case alerts on support cases, performance metrics, and more, see the help topic Monitoring Support Performance. For access to all of the NetSuite user guides, see the help topic User Guides.
Sales and Marketing	For information about marketing automation including capturing leads, marketing campaigns, and more, see the help topic Marketing Automation Overview. For information about sales force automation including set up, sales forecasting, commission, and more, see the help topic Sales Force Automation Overview. For information about managing partners including creating partner records and more, see the help topic Managing Partners. For information about partner commissions and royalties including schedules, plans, and more, see the help topic Partner Commissions & Royalties. For access to a variety of partner reports, see the help topic Partner Reports. For access to all of the NetSuite user guides, see the help topic User Guides.

Commerce Documentation Summary

With NetSuite commerce, you can create and manage web stores, and point of sale applications. The following help is available in the Commerce section:

Store Front	Learn how to implement a web store that includes the full shopping, checkout, and my account experiences. SuiteCommerce lets you create, customize, and configure dynamic and engaging web stores without requiring in-depth development. SuiteCommerce Advanced provides full permissions to the front-end code, so you can fully customize your web store. See the help topic Store Front.
Site Management Tools	SuiteCommerce Site Management Tools let you manage the content of your web store, add landing pages, and improve existing ones. See the help topic Site Management Tools Overview.
SuiteCommerce InStore	SuiteCommerce InStore (SCIS) is a web-based point-of-sale application available for the U.S. market. It provides a touch-based user interface specifically designed for tablets. See the help topic SuiteCommerce InStore (SCIS).

Developer Documentation	In the developer documentation you can find information about how to set up and use the tools to customize and manage your web store. You'll also learn how to access NetSuite APIs and create extensions to improve your web store experience. See the help topic Commerce Developer Documentation
Site Builder Sites	Site Builder is the legacy commerce solution. You can build Standard NetSuite Web Sites, Sites Hosted in NetSuite, External Catalog Sites, or Site Builder Combination Sites. See the help topic Site Builder Overview.
NetSuite Point of Sale	NetSuite Point of Sale (POS) is the in-store register component of the SuiteCommerce product line. See the help topic NSPOS Administrator Guide.

SuiteCloud Platform Documentation Summary

The SuiteCloud platform offers a comprehensive set of tools to help you customize and extend NetSuite to fit your business needs. Any customizations you make on the platform automatically migrate with every NetSuite upgrade. The following documentation is available for the SuiteCloud platform:

Introduction	Learn how to customize NetSuite to your own needs with SuiteCloud Platform. Learn about the records reference tools available and review the SuiteCloud platform glossary for new terminology. See the help topic SuiteCloud Platform Introduction.
Point-and-Click Customization	Customize NetSuite fields, forms, record types, transaction types, segments, and centers using a point-and-click experience. You can control how users of your NetSuite account access and enter information. For more information, see the help topic Customization. For templates customization, such as advanced PDF/HTML templates, advanced templates reference, scriptable templates, and basic printing layouts, see the help topic Template Customization. Copy a custom object to another account with Copy to Account. Select a target account, choose dependencies, specify whether to include instances, if applicable, and then preview and deploy the custom object. See the help topic Copy to Account.
Workflow Engine	SuiteFlow provides developers and customers with point-and-click tools to customize and automate business processes, such as lead nurturing, transaction approval, record management, and more. See the help topic SuiteFlow (Workflow).
Custom Coding	Built on industry-standard JavaScript, SuiteScript and SuiteScript 2.x enables full-featured application-level scripting capabilities that support sophisticated procedural logic and feature robust debugging capabilities throughout NetSuite. Many NetSuite records support SuiteScript. See the help topic SuiteScript. SuiteCloud Development Framework (SDF) is a development framework and deployment mechanism. It gives developers and partners IDE tools that customize NetSuite accounts and deploy solutions. See the help topic SuiteCloud Development Framework. SuiteCloud Software Development Kit represents tools for customizing accounts through SuiteCloud Development Framework. Available tools are SuiteCloud IDE plug-in, SuiteCloud CLI, and other extentions. See the help topic SuiteCloud SDK.
Managing SuiteApps	Define and manage your SuiteApp distribution process in one place. Upload SuiteApp projects to SuiteApp control center and distribute them in the SuiteApp Marketplace, from which users can install and upgrade SuiteApps. See the help topics SuiteApp Control Center and SuiteApp Marketplace.
Distribution	Use the SuiteApp Marketplace to find and install SuiteApps. SuiteApps can include customizations and configuration settings useful to your organization. To learn about the information that is available for each SuiteApp, see the help topic Viewing SuiteApps in the SuiteApp Marketplace.

	If you create SuiteApps, use the SuiteApp Control Center to define and manage your SuiteApp distribution process. You can upload SuiteApp projects to SuiteApp Control Center and distribute them as SuiteApp versions to the SuiteApp Marketplace. For more information about getting started with SuiteApp Control Center, see the help topic Accessing SuiteApp Control Center.
Integrations	SuiteTalk SOAP web services help customers and partners integrate NetSuite with existing on-premise investments and third party cloud applications. Integrations can use Java, .NET, or any other programming language that supports SOAP-based web services. See the help topic SuiteTalk SOAP Web Services Platform Guide. The SuiteTalk SOAP web services records guide contains a description of each record, including information about supported operations, field definitions, usage notes, and code samples. The guide includes links to the SOAP Schema Browser. See the help topic SuiteTalk SOAP Web Services Records Guide. SuiteTalk REST web services offer a REST-based interface for interacting with NetSuite. See the help topic SuiteTalk REST Web Services API Guide SuiteTalk REST web services records guide lists the records that you can access through REST web services. See the help topic SuiteTalk REST Web Services Records Guide. The Import Assistant supports bulk transfer of data from other applications into NetSuite using CSV files. The wizard lets you visually map CSV columns to NetSuite fields. See the help topic CSV Imports. With the AI Connector Service, NetSuite gives you the option to use an external AI client to complete some of your tasks. NetSuite has adopted the Model Context Protocol (MCP), which boosts its integration capabilities and enables secure interactions between AI models and data systems. This feature provides you with a seamless integration that lets supported AI clients directly access and interact with NetSuite data and functionality. See the help topic NetSuite AI Connector Service.
Plug-ins	NetSuite develops core plug-ins and releases them to partners or customers. You can create and test new core plug-in implementations using the SuiteScript Debugger. See available core plug-ins in Core Plug-ins. You can also develop, implement, and manage your own custom plug-ins in NetSuite. See the help topic Custom Plug-ins.
Supported Records and Samples	See a comparison of record types supported for SuiteScript, Web Services integration, SuiteAnalytics Connect, and CSV import. See the help topic SuiteCloud Supported Records. For information about the record types, fields, and relationships available for a specific NetSuite channel, see the Records Catalog. The Records Catalog includes the custom records, forms, and fields for your account, based on the features you're using. See the help topic Records Catalog. NetSuite offers sample customization projects created with SuiteCloud platform tools. Explore these samples to determine which SuiteCloud tools suit you best to customize NetSuite for your organization. Also, you can browse tutorials that walk you through creating sample customization projects using SuiteCloud concepts. See the help topic SuiteCloud Customization Tutorials.

SuiteAnalytics Documentation Summary

SuiteAnalytics tools include built-in ad hoc reporting, real-time dashboards, and ODBC access across NetSuite and all customizations. These business intelligence tools help you identify issues, trends, opportunities, and support instant drill-down to underlying records, for quick action. The following SuiteAnalytics documentation is available:

Dashboards	NetSuite dashboards provide you with a visual workspace with personalized data to help you make decisions and edit records. Dashboard content is displayed in dynamic data display

	windows called portlets. Some portlets show raw data, while others display key metrics, such as key performance indicators (KPIs), performance scorecards, trend graphs, and report snapshots. Other portlets enable the display of data from website RSS feeds. See .
Workbook	Create and customize datasets and workbooks that leverage the analytics data source. In the dataset, select record types, fields, and criteria for further analysis in a workbook. In the workbook, visualize and analyze your data using tables, pivot tables, and charts. Visualizations in a workbook can all be based on different datasets. You can author your datasets and workbooks using field data from multiple record types, including custom record types. You can also create and add fields with dynamically calculated values, and easily view data for fields with parent-child relationships. See the help topic Workbook.
Search	NetSuite offers various search tools to help you 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. See the help topic Search.
Reporting	NetSuite offers reporting tools to help you retrieve, present, and analyze real-time business results. You can run prebuilt reports, or customize them by setting per-user preferences, selecting per-report viewing options, or defining custom reports in the Report Builder or Financial Report Builder. See .
Connect	The SuiteAnalytics Connect Service lets your business archive, analyze, and report on its data using a third-party tool or custom-built application. NetSuite supports the use of ODBC, JDBC, and ADO.NET drivers to connect with NetSuite from any device running on a Windows, Linux, or OS X operating system. You can use Microsoft® Excel, BIRST, Adaptive, or any other compatible application to work with the Connect Service. You can also access the Connect Service using the NetSuite2.com data source only. See .
NetSuite Analytics Warehouse	The NetSuite Analytics Warehouse enables you to broaden the analyses of your NetSuite data. After you transfer your data to the Analytics Warehouse, you can combine it with historical data and data from other sources to analyze it using more visualizations. See the help topic NetSuite Analytics Warehouse Overview.

SuiteApps Documentation Summary

SuiteApps are applications that extend NetSuite functionality. SuiteApps are developed on the SuiteCloud platform, packaged using SuiteBundler, and delivered as a bundle or a collection of bundles. See the following for more information about SuiteApps:

NetSuite SuiteApps	NetSuite builds, distributes, and supports some SuiteApps. SuiteApps usually have more frequent release cycles. For a list of currently supported NetSuite SuiteApps, see the help topic SuiteApps.
Third Party SuiteApps	For information about SuiteApps developed and supported by third parties, see SuiteApp.com. On SuiteApp.com, you can search partner SuiteApps by industry, business need, or keyword. Also, you can read customer reviews, try out solutions, and find out where to buy these SuiteApps.
Installing SuiteApps	If you're the administrator of a NetSuite account or you have the SuiteApp Marketplace permission, you can install any public bundle, as well as any bundle that has been shared with your account. See the help topic SuiteApp Installation and Update.
Building SuiteApps	The SuiteBundler feature supports the creation and distribution of SuiteApps. The Bundle Builder is an assistant that guides you through the process of packaging customizations into bundles. See the help topic SuiteBundler.

	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 SuiteCloud Development (SDF) features instead of SuiteBundler. 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 .
SuiteCloud Developer Network	If you're interested in creating SuiteApps for distribution and sale, you should join the SuiteCloud Developer Network (SDN), the NetSuite third-party developer program. For information about this program, see Developers Overview.

Account Administration Documentation Summary

NetSuite account administrators need to do many tasks to set up and maintain the NetSuite application and related customizations. The following documentation is available for these tasks:

Account Administration Overview	Guidelines for setting up NetSuite and maintaining and upgrading your NetSuite account. You can also see the Account Administration guides summaries. See the help topic Account Administration Overview.
Account Setup	Setup of a NetSuite account requires enabling features, setting company preferences, defining classifications for NetSuite records, managing NetSuite roles and permissions, and incorporating approval routing. See the help topic Account Setup. For information about NetSuite OneWorld, see OneWorld Documentation Summary.
Email for Administrators	Setup of DomainKeys identified mail, information about blocklists and spamlists, setup of scriptable templates, size limits of emails and attachments, and DMARC-compliant messaging in NetSuite. See the help topic Email for Administrators.
Authentication	NetSuite supports many authentication methods, including two-factor authentication, token-based authentication, OAuth 2.0, Device ID authentication, Single Sign-on (outbound, SAML, and OpenID Connect), Digital Signing, SSH Keys, secrets management, and RESTlet authentication. For more information about password requirements and policies in NetSuite, see the help topic Authentication.
CSV Imports	The Import Assistant supports bulk transfer of data from other applications into NetSuite using CSV files. The wizard lets you visually map CSV columns to NetSuite fields. See the help topic CSV Imports.
Auditing and Data Management	NetSuite helps you track changes, manage internal controls, manage transactions, remove personal information, audit data changes, and avoid duplicates. See the help topic Auditing and Data Management.
System Notes	NetSuite uses System Notes to track any changes made to a record. A system note captures the date when the change was made, who made the change, the role of the user who made the change, the type of change, and the old and new value in the record. System Notes v2 captures detailed changes such as sublist information and groups the changes under high-level actions. Learn about the differences between System Notes and System Notes v2. See the help topic System Notes Overview.
Cloud Infrastructure	Best practices for accessing NetSuite through the UI, SuiteTalk web services, SuiteScript, RESTlets, Single Sign-on, SuiteAnalytics Connect, or other NetSuite services. Learn about NetSuite accounts in a cloud environment, traffic health, NetSuite URLs, DataCenterUrls

	REST service, the REST role service, and more. See the help topic Best Practices for Cloud Accounts.
Account Customization	Customize the NetSuite UI and business logic through scripting or through point-and-click options in the UI, create custom roles and customize access, share your customization with other accounts, and integrate information from other systems. See the help topic SuiteCloud Platform Customization.
NetSuite Account Types	NetSuite offers you test accounts for developing and testing new applications and customizations. You can use release preview, sandbox, and development accounts without impacting the production account. See the help topic Understanding NetSuite Account Types.
Performance	Best practices and troubleshooting tips enable you to optimize NetSuite performance. To help troubleshoot performance issues, use the Application Performance Management (APM) SuiteApp to monitor and manage NetSuite performance for business-critical operations. See the help topic Performance.
Globalization	NetSuite supports multi-language features, managing translation collections, and localization context filtering for user event and client scripts. See the help topic Globalization.

OneWorld Documentation Summary

NetSuite OneWorld helps you manage multiple areas of your multinational, multicompany business including financial statements, customers, e-commerce, services resource planning (SRP), business intelligence, and tax and compliance management. The solution crosses product areas, and the documentation for OneWorld is integrated with the various functional areas.

Getting Started with OneWorld	This section of the help introduces OneWorld and its features across all NetSuite product areas. Begin here and follow the links to learn how OneWorld affects accounting and ERP, CRM, SRP, and analytics. See the help topic Introduction to NetSuite OneWorld.

Country-Specific Documentation Summary

NetSuite offers features tailored to business needs that are specific to some countries. These features help you adapt to local business practices and comply with regulations or requirements in the countries that you operate in.

Country-Specific Topics	NetSuite provides solutions for a growing number of countries as part of its global offerings. For many of them, you can find help under the Overview of Country-Specific Features. This section covers features, SuiteApps for individual countries, best practices for account setups, and country-specific information related to taxes and payment formats. For countries without a separate country-specific help topic but with their own specific features supported by NetSuite, see the help topic General International Tax Topics or Setting Up Payment File Formats.
Country-Specific Tax Topics	Taxation in global business involves both international and country-specific topics. For some countries, you can find country-specific tax help topics in Overview of Country-Specific Features. For countries that don't have separate tax help topics, see the help topic General International Tax Topics. This section introduces general tax topics and links to country-specific topics.
Country-Specific Payment File Formats	The Electronic Bank Payments SuiteApp offers payment file formats for payments, receivables, and Positive Pay transactions. For some countries, country-specific

payment formats help topics are available in Overview of Country-Specific Features. For countries without a separate country-specific help topic, see the help topic Setting Up Payment File Formats.

Accessing the Help Center

Watch the following video to learn how to access the help center.

Accessing the Help Center

The NetSuite help center contains all technical documentation that you need to learn how NetSuite features work. There are a few ways to access the help center.

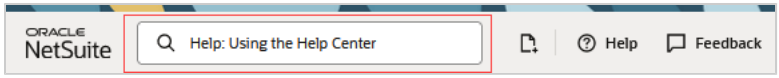
You can click the Help link in NetSuite on the header. The help center opens in a new tab. You must be logged in to NetSuite to open the help center.

Many NetSuite pages have context-sensitive help topics. So, if you click the help link while viewing a page in NetSuite, the relevant help topic opens automatically.

Note: Some pages, such as those provided by a SuiteApp, don't have context-sensitive help topics. So, if you click the help link on a page with no context-sensitive help, the help center displays the home page.

You can also search the help center directly by using the Global Search field in NetSuite.

In the Global Search field, type **Help:** followed by the text you want to search for. For example, Help: Using the Help Center. The help center opens in a new window and shows you a list of topics matching your search criteria.

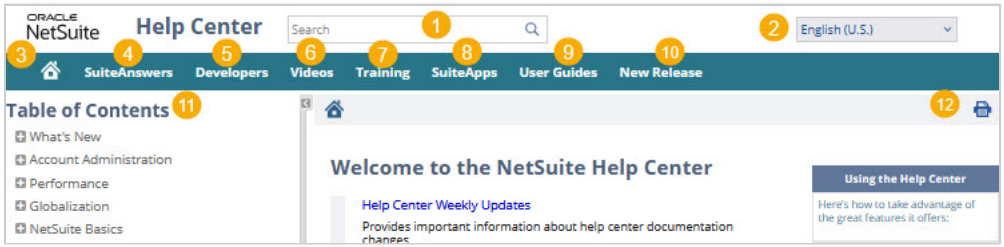


Using the Help Center Window

Watch the following video to learn how to use the help center.

Using the Help Center

The help center has many features to help you find what you need to know about NetSuite. For information about how to access the help center, see Accessing the Help Center.

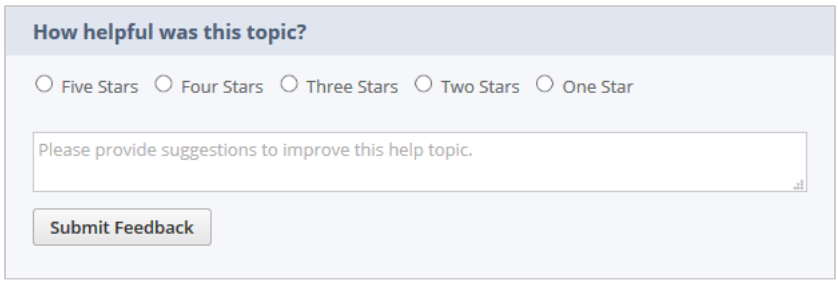


1	**Search** – To search for help topics for the pages and features of NetSuite, type a keyword or phrase in the Search field of the Help window, and press Enter. For more information, see Searching for Help.
2	**Language Preference** – If your account has the multi-language feature enabled, you can choose your preferred language displayed in the NetSuite Help Center from the dropdown list at the top right corner of the page. This language preference is independent of the language preference you specify for the NetSuite user interface. You can switch between languages in the Help Center, if needed. The next time you open the Help Center, it opens in the language you last chose. You can choose from these languages: 简体中文(Chinese Simplified), Deutsch (German), English, 日本語 (Japanese), Español (Spanish). **Note:** You can also set the language of the Help Center using the Set Preferences link. See Setting Personal Preferences, specifically, the entry for Language of the Help Center in the User Profile section.
3	**Home** – Click the home icon on the toolbar to go back to the Help Center home page. A home icon also appears at the top of each help topic.
4	**SuiteAnswers** – Click SuiteAnswers to go to the SuiteAnswers site. This page opens in a new tab. SuiteAnswers is a searchable repository of support solutions, best practices, training videos, and help topics.
5	**Developers** – Click Developers to view a list of resources for SuiteCloud and Commerce developers.
6	**Videos** – Click Videos to view a list of help videos that demonstrate how to perform specific tasks in NetSuite. When you click a link, you're redirected to the Oracle Learning Library to view the video.
7	**Training** – Click Training to go to the SuiteTraining site. This page opens in a new tab. Here you'll find complete information about the courses and certification programs that NetSuite offers.
8	**SuiteApps** – Click SuiteApps to open a list of current SuiteApps. You'll also find a link to SuiteApp.com where you can find information about SuiteApps developed by SDN Partners and other third parties.
9	**User Guides** – Click User Guides to open a list of available PDF guides. These User Guides offer conceptual details and setup information for specific areas of NetSuite. Click the PDF icon beside a User Guide to open the PDF in a new window.
10	**New Release** – Click New Release to open a page with links to Sneak Peeks, Release Notes, and other important information for the newest release of NetSuite.
11	**Table of Contents** – Click the arrows at the top of the divider to hide or show the Table of Contents. Click the Show in Table of Contents icon in the page header to find the current topic in the Table of Contents. Seeing a topic within the organization of the Table of Contents can help you find related topics or understand where you're in a process or a feature.
12	**Print Icon** – Click Print icon in the page header to print the current help topic. Or, right-click and use the browser's Print function.

Submit Feedback for Help and Search

When you view or search for help topics, you can submit feedback about the helpfulness of the topic content or search results.

- At the bottom of search results, select Yes or No to answer whether the search results helped answer your question. Then click Submit Feedback.
- At the bottom of help topics, rank how helpful they are from Five Stars for the most helpful to One Star for not helpful. Type suggestions and comments in the text box. Then click Submit Feedback.



Help Topic Navigation

Help topics often provide navigation steps to help you find pages in your NetSuite account. In most cases, this navigation is tailored to your role, showing you the relevant tabs, headings, and links.

Consequently, you may see different navigation for the same help topic if you use more than one role.

For example, Krista Barton is a sales rep who is assigned the standard Sales Rep role. When Krista reads a help topic about creating a customer record, she's directed to Customers > Relationships > Customers. If Krista was logged in with the Marketing Assistant role, the help topic would direct her to Leads > Relationships > Customers.

Sometimes, help topics might mention pages or features you can't access or that aren't enabled in your account. In these cases, the navigation steps are shown as if you were logged in as an account administrator.

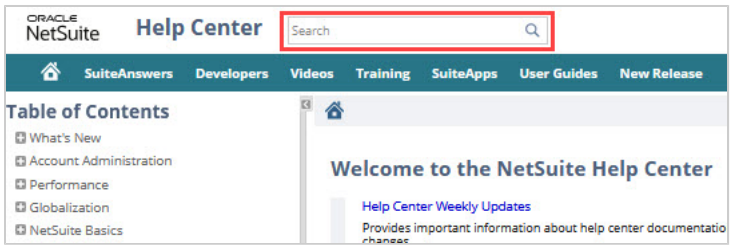
For example, Krista is logged in with her Sales Rep role and wants to read about how marketing campaigns work in NetSuite. When reading a help topic on the creation of marketing campaigns, the navigation directs her to Lists > Marketing > Campaigns. This is the navigation she'd see if she was logged in as an account administrator.

If you want access to a page in NetSuite you don't have permission to view, speak to your account administrator about assigning you a new role, customizing your existing role, or enabling features in your company's NetSuite account.

Searching for Help

When you have questions about NetSuite, you can search the NetSuite Help Center for help.

The header of the NetSuite Help Center Home page has a search bar in the center. When you open the Help Center, your cursor starts in the search area.



Type a search term and press the Enter key to get a list of most relevant topics.

If you don't find the topics you need, or if your search returns too many results, try one of the following:

- If you know the exact phrase, type it inside quotation marks.
- Unless you know the exact words or phrases in a help topic, use general keywords or phrases to find more help topics.
- Avoid phrasing your search as a question.
- Look for links to related topics. Most topics have links to other help articles. You'll find these related topics at the bottom of the article.
- Look through the table of contents to find the topic you want.

The search process for the NetSuite Help Center follows these general rules:

- All words you type in the search area must match 66%.
- An exact match within quotation marks appears first in the list of results, but you'll also see other close matches.
- The search looks for the stem of the words you type rather than their inflected forms. You don't have to search for both the singular and plural of nouns, or different verb forms.

The search also supports synonyms and fixes typos, making it easier to find what you need.

Getting Field-Level Help

Field-Level Help

For specific information about a field on a NetSuite page, click the label next to the field. A popup window appears with information about how to use that field.

NetSuite Guided Learning

The NetSuite Guided Learning tool gives you contextual step-by-step instructions to help you complete tasks within NetSuite. The feature is available in all NetSuite accounts with over 350 guides in 24 languages.

NetSuite Guided Learning has three main categories:

- Overviews – Guides that help you work with the Home page and the NetSuite Center Tabs.
- Useful Tools – Guides that help you personalize NetSuite, use global search, create shortcuts, and more.
- Help & Support – Guides that introduce you to all help options available in NetSuite.

Accessing NetSuite Guided Learning

You can find all the guides in the Help Panel.

To open the Help Panel, on the right side of the screen, click the **i** button.

To close the Help Panel, at the top of the panel, click the close button.

Using NetSuite Guided Learning

To start using NetSuite Guided Learning, open the Help Panel, and click a guide title. The guide walks you through the selected task using pop-up windows and pointers to help you enter all required fields, click buttons, and complete the task.

To find a specific guide, type a keyword into the search bar at the top of the Help Panel and press Enter.

To learn more about using NetSuite Guided Learning, complete the **Tell Me About Guided Learning** guide. The guide is available under the Navigation and Welcome in the Help Panel.

Note: To disable NetSuite Guided Learning, go to Home > Set Preferences and clear the **Enable Oracle Guided Learning** box. To enable NetSuite Guided Learning, ensure the **Enable Oracle Guided Learning** box is checked.

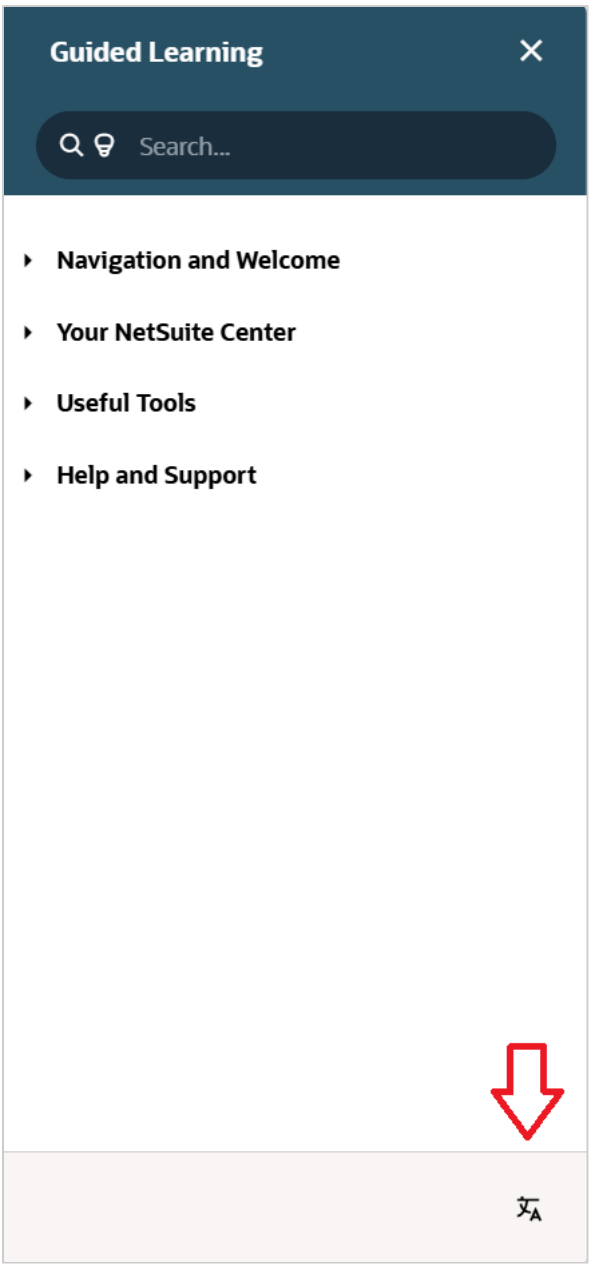
As an administrator, you can enable/disable NetSuite Guided Learning globally for all NetSuite roles in your company account. To do this, go to Setup > Company > General Preferences, and check or clear the **Enable NetSuite Guided Learning** box, and click **Save**.

Important: If you disable NetSuite Guided Learning globally, users with other NetSuite roles won't be able to enable NetSuite Guided Learning in their accounts. If you enable NetSuite Guided Learning globally, users with other NetSuite roles will be able to enable or disable NetSuite Guided Learning in their own accounts.

As an administrator, you can also see the **Set NetSuite Guided Learning Application ID** and **Set NetSuite Guided Learning Environment** fields on the General Preferences page. These fields are internal. They help determine the instance of the NetSuite Guided Learning tool. Ensure that you keep the default values of these fields. If you change them, NetSuite Guided Learning may stop working correctly.

Language Preference

To set a preferred language for NetSuite Guided Learning, click the **Languages** button at the bottom of the left side of the Help Panel.



The languages you can choose from:

- CHS (Chinese Simplified)
- CHT (Chinese Traditional)
- CZE (Czech)
- DAN (Danish)
- DUT (Dutch)
- ENG (English)
- FIN (Finnish)
- FRE (French)
- GER (German)

- IND (Indonesian)
- ITA (Italian)
- JPN (Japanese)
- KOR (Korean)
- NOR (Norwegian)
- POR (Portuguese)
- RUS (Russian)
- SPA (Spanish)
- SWE (Swedish)
- THA (Thai)
- TUR (Turkish)
- VIE (Vietnamese)

Keyboard Shortcuts

In the following table, you can see a list of available shortcuts that you can use with NetSuite Guided Learning.

Keyboard Shortcut	Description
Alt + Ctrl + H	Open and close the Help Panel. The Help Panel opens with focus on the Search bar. You can then use the Tab key to move within the panel.
Ctrl + Alt + L	Open or close language selection menu while the Help Panel is open.
Esc	Close the Help Panel and return the focus to NetSuite.

FAQ: NetSuite Guided Learning

This article summarizes the most common questions you might have about NetSuite Guided Learning.

- NetSuite Guided Learning is enabled in my account, yet I can't see the Help Panel. What does this mean and what should I do?
- I launched one of the guides but did not follow it and clicked elsewhere in the user interface. Does this interrupt the guide?
- Can I create my own guides or customize the existing ones?

NetSuite Guided Learning is enabled in my account, yet I can't see the Help Panel. What does this mean and what should I do?

Note that the Help Panel isn't visible on all pages of NetSuite. However, if you have the feature enabled, you should see it on your home page. If you can't see it there, go to Home > Set Preferences and ensure

that the **Enable Oracle Guided Learning** box is checked. If the feature is enabled but the Help Panel is still unavailable, contact your account administrator or, if you have the permission, submit a Support case.

I launched one of the guides but did not follow it and clicked elsewhere in the user interface. Does this interrupt the guide?

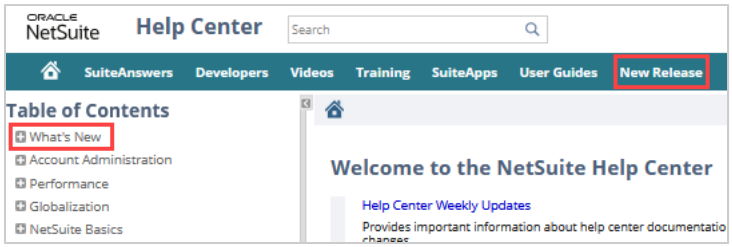
Yes, the guide gets interrupted. You need to use the Help Panel to start the guide again.

Can I create my own guides or customize the existing ones?

Not right now. While NSGL does not support self-service creation or customization of guides, customers can enhance their learning experience through the NetSuite Guided Learning Managed Service. This paid offering allows businesses to collaborate with a specialized team to develop custom guides tailored to their specific workflows, roles, and policies. Additionally, the service provides advanced features such as analytics to monitor user engagement and effectiveness, change messaging to communicate updates or process changes, and the support of an education expert to ensure optimal learning outcomes. To learn more about this service, please contact your Account Manager.

Finding Out What's New in NetSuite

You can find out what's new in NetSuite in several ways. To see what's new, click on **New Release** on the NetSuite Help Center toolbar or on the What's New topic in the table of contents.



Sneak Peaks

Sneak Peeks are available before a new version when significant new features are added. They give you a preview of what to expect of the new features and enhancements. To use Sneak Peeks, see the help topic NetSuite Sneak Peeks.

Release Notes

Release Notes document all changes made in the latest version of NetSuite. This includes new features, preferences, enhancements, and issues that have been resolved.

Release notes help you quickly learn about new features and enhancements. For current Release Notes, see the help topic Release Notes.

Help Center Weekly Updates

Use the Help Center Weekly Updates topic to find out which help topics and PDF files have been added or updated in each build of the NetSuite Help Center.

To open Help Center Weekly Updates, see the help topic Help Center Weekly Updates. The main Help Center Weekly Updates page is broken into sections. Select a build date to see the changes made that week.

Release Preview

Release Preview is a temporary and isolated test account that is running the new version of NetSuite software. The Release Preview account lets you get familiar with new features before they're released.

The Release Preview Guide provides instructions for using Release Preview and examples of features you might want to test.

For more information about Release Preview and to access the Release Preview Test Plan, see the help topic Release Preview Guide.

SuiteAnswers Overview

Watch the following video to see the overview of SuiteAnswers features.

SuiteAnswers Overview

SuiteAnswers is the NetSuite self-service support site where you can view announcements, support articles, videos, help topics, and best practice documents for NetSuite. From SuiteAnswers, you can also submit a question or issue by email or contact NetSuite Customer Service by phone.

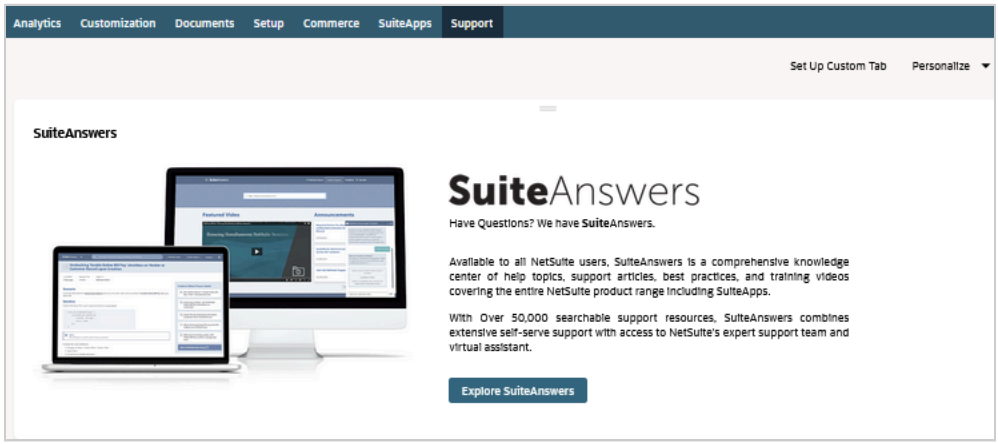
Accessing SuiteAnswers

You can access SuiteAnswers in the following ways:

- In the NetSuite Help Center, click **SuiteAnswers** on the toolbar.
- In the NetSuite user interface, choose the Support > Go to SuiteAnswers menu option, or: on the Support tab, click the Go to SuiteAnswers button in the SuiteAnswers portlet.

You must be logged in to NetSuite to access SuiteAnswers.

Note: If you're using an Employee Center, Customer Center, Vendor Center, or Partner Center role, you won't be able to access the SuiteAnswers portlet. If you're using any of these roles, you must switch to another role to access SuiteAnswers.



Note: If you don't see the SuiteAnswers portlet, click Personalize Dashboard in the upper right. In the Add Content portlet, click SuiteAnswers to add the SuiteAnswers portlet to your Support tab.

Note: To access SuiteAnswers, users must have a first and last name in their employee record. If an employee record is missing a first or last name, users get an error message when trying to access SuiteAnswers. Verify that the employee records of your users have the correct values in the first name and last name fields. For more information, see the help topic Employee Information Management.

SuiteAnswers vs. Help Center

The following table lists the differences between SuiteAnswers and the NetSuite Help Center:

Resource	SuiteAnswers	Help Center
Help Topics	yes	yes
Videos	yes	yes
NetSuite Knowledge Base	yes	no
Help Table of Contents	no	yes
User Guides	yes	yes
SuiteProjects Pro Knowledge Base	yes	no
Multi-language Content	no	yes
Context Sensitive Help	no	yes
NetSuite Virtual Support Assistant	yes	no

Using Search in SuiteAnswers

SuiteAnswers offers tools to help you search its knowledge base, including:

- **Search options** – You can search by using natural language, keywords and article ID. You can use quotes to include certain phrases or you can use them to search for specific errors you encounter.
- **Search bar features** – The search bar features suggested Type-ahead and search history.
- **Search filters** – You can filter by content type, product categories and target audience.

SuiteAnswers uses NetSuite Expert that enhances the natural language search capability. To learn more about the capabilities of NetSuite Expert, see NetSuite Expert in SuiteAnswers.

Critical Announcements

Critical announcements dealing with performance issues or planned maintenance are displayed at the top of the page in SuiteAnswers. Critical announcements appear on every page until you close them by clicking the X at the top right. The announcement reappears only after you log out and log back in to SuiteAnswers.

Support Cases in SuiteAnswers

NetSuite Support Services has two support offerings for customers: Basic and Premium.

To view your account's support subscription level, go to the Support tab in your NetSuite account, select Go to SuiteAnswers, and then click Contact Support at the top.

On the Contact Support page, you can find the NetSuite Support phone numbers, your account number, and your Call support subscription level. In addition, you can also find information about our Phone Menu and details about our issue resolution process.

See the tables below for the options available in the Basic and Premium Support offerings.

Basic SuiteSupport Overview		
Inquiry Type	**Support Channels**	**Availability**
Critical Problem	Phone Support	24x7
Report a Problem	Online Case (Through NetSuite Virtual Support Assistant)	24x7
Ask a Question	NetSuite Virtual Support Assistant	24x7
	NetSuite Community	24x7

Premium SuiteSupport Overview		
Inquiry Type	**Support Channels**	**Availability**
Report a Problem	Phone Support	24x7
	Online Case	24x7
Ask a Question	Online Case	24x7
	NetSuite Virtual Support Assistant	24x7
	NetSuite Community	24x7

Watch the following video to learn how to contact SuiteAnswers support and how to create a support case.

SuiteAnswers Support

For more detailed information about how to create a support case in SuiteAnswers, see Creating Support Cases in SuiteAnswers

Creating Support Cases in SuiteAnswers

Note: At peak times, cases can take longer to submit. A notification will display telling you the submission process is still underway.

To create a support case, see one of the following procedures based on your support offering:

- To create a support case (Basic Support):
- To create a support case (Premium Support):

To create a support case (Basic Support):

1. Go to the Support tab in your NetSuite account, select Go to SuiteAnswers, and then click Contact Support at the top.
2. Start with an AI-powered chatbot - **NetSuite Virtual Support Assistant** - for quick answers to your basic NetSuite questions. A chatbot icon is visible on all SuiteAnswers pages. Click the icon to bring up the NetSuite Virtual Support Assistant.
3. Chat with the Virtual Assistant for your query. If the Virtual Assistant cannot find a satisfactory answer, request Additional Support options to connect to other support channels. This will bring up 2 options – Ask in the NetSuite Support Community and Report a Problem.
4. Select Report a Problem. This will open the form to create an online support case.

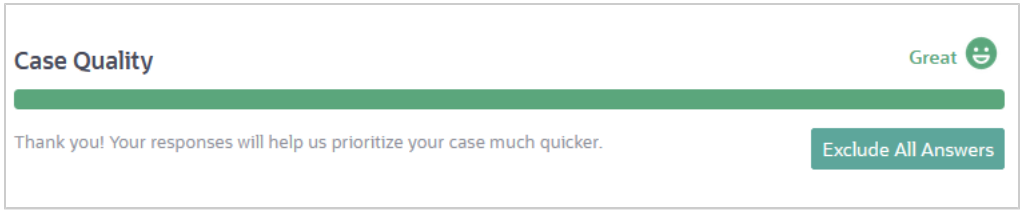
   > **Note:** With Basic support, you can submit only critical problems that impact your business operations. For other problems or questions, you can ask for advice from NetSuite professionals and a dedicated team of Support Gurus in the NetSuite Support Community. Registration is required.

5. Enter a brief description of your problem, and answer the provided questions if possible.
6. Attach any relevant files. The maximum file size for one file is 10MB.
7. Optional: enter a contact number and select a time zone from the dropdown list.
8. Optional: check the **Allow a NetSuite Representative to log into a replica of your account for this case** box. For more information, see NetSuite Support Login
9. Click **Submit Case**.

To create a support case (Premium Support):

1. Go to Contact Support > Create Support Case.
2. Enter a query and check if an existing help topic relates to your issue.
3. If no help topic matches your query, select a type of case from the dropdown list.
4. Select a case severity.
5. If creating a C1 case, check the **24 x 7 availability** box, or complete the additional fields as requested.
6. Enter a brief description of your problem, and answer the provided questions if possible.
7. Attach any relevant files. The maximum file size for one file is 10MB.
8. Optional: enter a contact number and select a time zone from the dropdown list.
9. Optional: check the "Allow a NetSuite Representative to log into a replica of your account for this case" checkbox. For more information, see NetSuite Support Login
10. Click **Submit Case**.

You'll get an email response as soon as possible. Response times vary depending on the level of support you have purchased and the support team's case load. To improve response times, please complete as many of the case specific questions as possible. The case quality indicator provides a useful visual guide about the optimum level of information to provide to Support.



If your role permits, you can check the status of your support cases in NetSuite 360. For more information, see NetSuite Support and Checking the Status of Support Cases.

NetSuite Expert in SuiteAnswers

NetSuite Expert in SuiteAnswers is designed to make your searches more powerful. Sometimes, keyword searches return too many results to be useful. With NetSuite Expert in SuiteAnswers, you can ask questions in natural language and get more focused answers.

> **Note:** NetSuite Expert in SuiteAnswers available to all NetSuite accounts, but only for English-language content.

NetSuite Expert has access to all the knowledge that is in SuiteAnswers, including NetSuite Help Center topics and SuiteAnswers articles. NetSuite Expert uses retrieval-augmented generation, or RAG, to respond with a summary of the information you seek. The summary also shows which sources the information comes from and includes links to specific articles so that you can explore further.

See the following sections for more information:

- Using NetSuite Expert in SuiteAnswers
- FAQ: NetSuite Expert in SuiteAnswers

Using NetSuite Expert in SuiteAnswers

The look of SuiteAnswers hasn't changed, but how search works has. You can still search SuiteAnswers like you always have, but results from NetSuite Expert in SuiteAnswers are more helpful when you ask a question.

> **Note:** For more examples of the questions you can ask, see FAQ: NetSuite Expert in SuiteAnswers.

To use NetSuite Expert in SuiteAnswers:

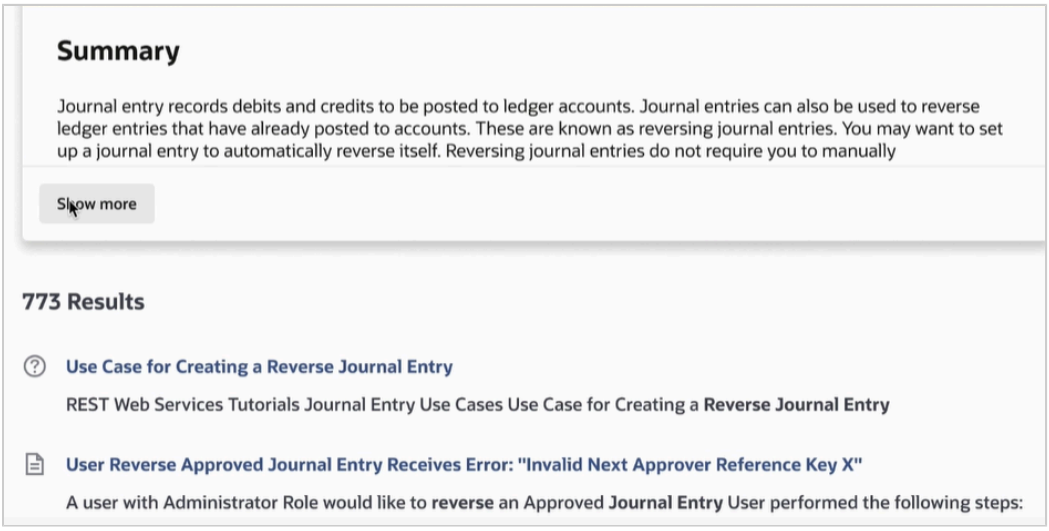
1. Log in to your NetSuite account and open SuiteAnswers in any of the following ways:
   - Click **Support** and select **Go to SuiteAnswers** menu option.
   - In the SuiteAnswers portlet on the Support tab, click **Go to SuiteAnswers.**
   - In the NetSuite Help Center, click **SuiteAnswers** on the toolbar.
2. Enter a question or phrase with at least three words into the search field.

   > **Note:** NetSuite Expert in SuiteAnswers enhances natural language search—it's not a chat application. Don't enter complicated scenarios or try to have a back-and-forth conversation.

Tip: You may have access to more than one NetSuite product or SuiteApp, all of which have release notes and accompanying documentation. To help in your search, try adding the product or SuiteApp name in your query. For example, instead of a generic request like "show me the release notes", you can try one of these phrases:

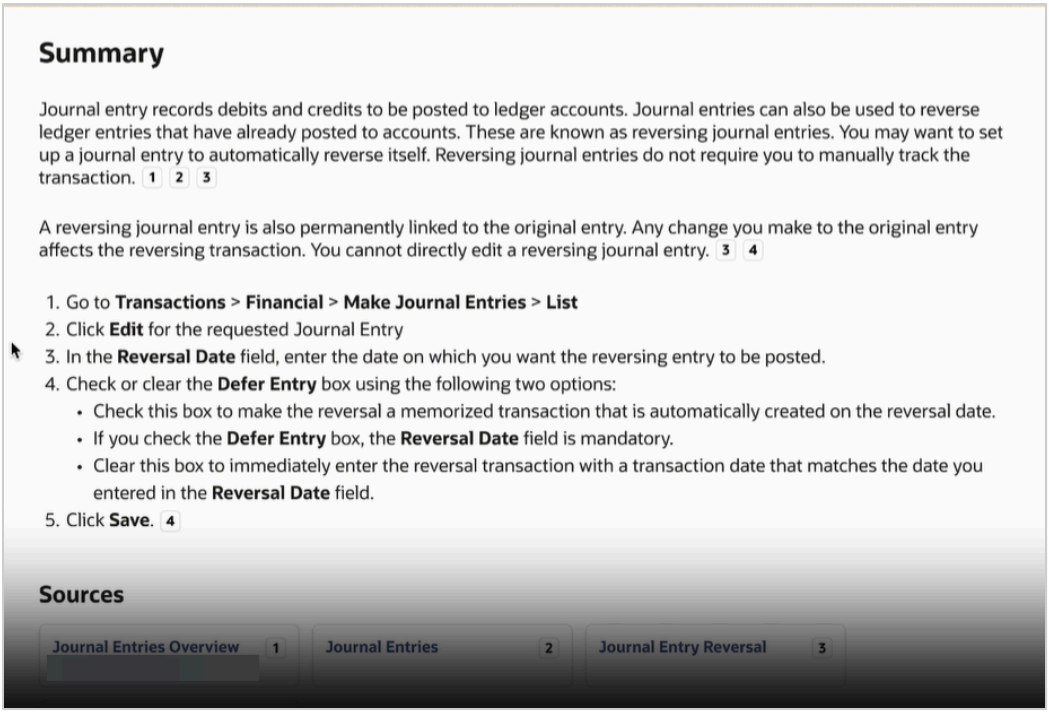
- show me the NetSuite 2025.1 release notes
- Where are the release notes for SuiteCommerce Advanced?
- I can't find the Field Service Management Release Notes

NetSuite Expert in SuiteAnswers works behind the scenes to find and summarize a relevant answer, which appears in a few seconds.



Important: The summarized content is generated using AI. The information provided may not be entirely free of errors or accurate. You should verify the accuracy of the summary by reviewing the source articles. You can also ask NetSuite Customer Support for information about security, access permissions, and similar topics. Oracle NetSuite does not assume any responsibility or liability for the use or interpretation of the content in the summary.

3. Click **Show More** to expand the summary.



Summary

Journal entry records debits and credits to be posted to ledger accounts. Journal entries can also be used to reverse ledger entries that have already posted to accounts. These are known as reversing journal entries. You may want to set up a journal entry to automatically reverse itself. Reversing journal entries do not require you to manually track the transaction. 1 2 3

A reversing journal entry is also permanently linked to the original entry. Any change you make to the original entry affects the reversing transaction. You cannot directly edit a reversing journal entry. 3 4

1. Go to **Transactions** > **Financial** > **Make Journal Entries** > **List**
2. Click **Edit** for the requested Journal Entry
3. In the **Reversal Date** field, enter the date on which you want the reversing entry to be posted.
4. Check or clear the **Defer Entry** box using the following two options:
   - Check this box to make the reversal a memorized transaction that is automatically created on the reversal date.
   - If you check the **Defer Entry** box, the **Reversal Date** field is mandatory.
   - Clear this box to immediately enter the reversal transaction with a transaction date that matches the date you entered in the **Reversal Date** field.
5. Click **Save**. 4

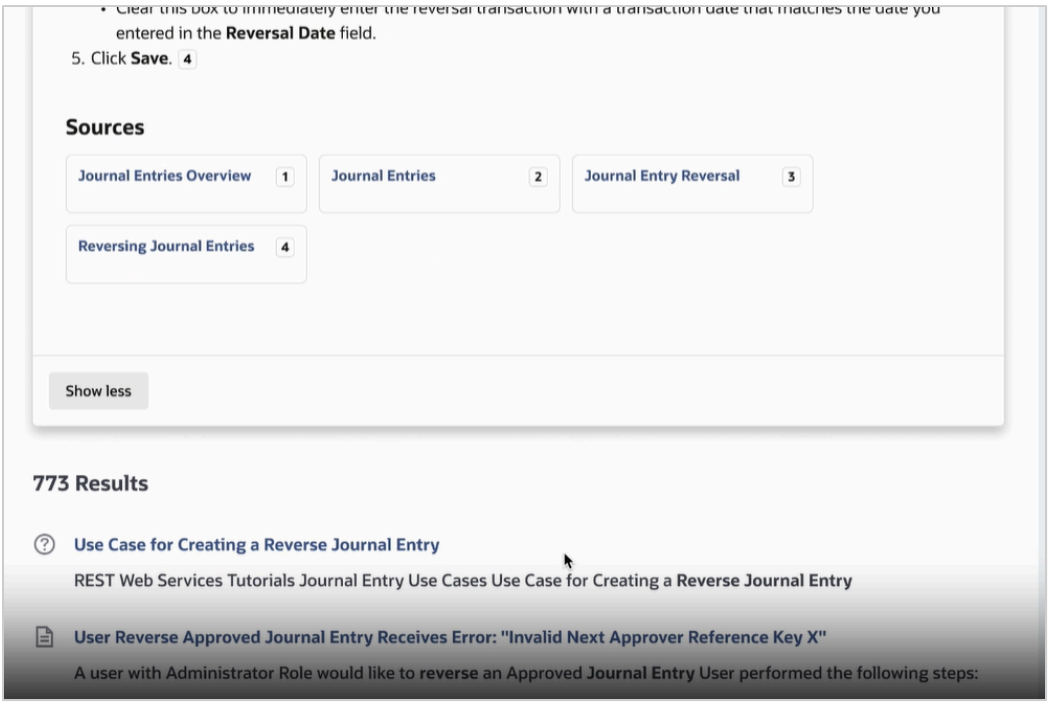
Sources

Journal Entries Overview 1 | Journal Entries 2 | Journal Entry Reversal 3

Important: Generative AI features, such as NetSuite Expert in SuiteAnswers, can be creative in their responses. You should always validate the summary generated by AI for accuracy and quality. You can verify the information against the original source articles cited in the summary.

4. To view a source article used in the construction of the summary, you can:
   a. Click the citation number in the summary text, for example: 5. Click **Save**. 4
   b. Click the title of the article you want to view in the Sources section, for example: Reversing Journal Entries 4.

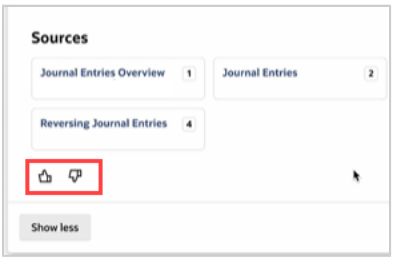
      Notice that the number shown next to the article's title matches the citation number in the summary.



You can also see the list of classic search results below the summary.

After you review the summary, you can send us your feedback.

5. If you liked the summary and found it useful, click thumbs-up . If you didn't get the answer you expected, click thumbs-down to open a text box and share your feedback.



FAQ: NetSuite Expert in SuiteAnswers

This section may help answer questions you have about using NetSuite Expert.

> **Note:** NetSuite Expert in SuiteAnswers available to all NetSuite accounts, but only for English-language content.

If you have other questions about how to use NetSuite Expert, see Using NetSuite Expert in SuiteAnswers.

What kind of things can I ask?

If your question is about NetSuite, ask anything that you would like to ask. NetSuite Expert in SuiteAnswers only summarizes answers about things related to NetSuite.

See the following table for examples of searches that NetSuite Expert in SuiteAnswers can help with.

Note: Some examples in the following table use quotation marks, but you don't have to use them in your queries. Sometimes quotation marks help you get more focused results, especially for multi-word concepts, like "saved search" or "bank feeds".

Instead of keywords like this:	Add context like this:
suitetax	What is SuiteTax? enable suite tax
record module	What actions are supported by record module? suitescript "record module"
bank feeds	How do I configure my bank feed? supported "bank feeds"
saved search	How do I create a saved search? "saved search" examples
suiteQL	How do I use SuiteQL? show me SuiteQL examples
bill capture	how do I capture vendor bills? "bill capture" preferences

Do I have to ask a question?

Asking a question helps, because it gives NetSuite Expert in SuiteAnswers more context for your search. However, asking a question is not required. What is needed to activate NetSuite Expert in SuiteAnswers is that you submit at least three (3) words.

The more context you give, the better your results will be. Using a phrase that is between three and seven words usually works well.

Note: If you are not asking a question, you may want to enclose your phrase or keywords inside quotation marks.

Is there a limit on how many queries can I submit?

Each user can submit up to 20,000 queries (requests) within 30 days. If a user goes over this limit, NetSuite Expert won't respond with a summary.

Is there a limit to how long my query can be?

The query limit is 255 characters. However, that's a lot of characters, about 35 words in a three-sentence paragraph. You'll probably get better results with a shorter, more focused query.

The summary answer doesn't seem right, why not?

You may see Generative AI mentioned everywhere in the news these days. NetSuite Expert in SuiteAnswers uses Oracle's Generative AI (GenAI) service. Be aware that GenAI is still new and experimental. Sometimes the answer isn't as good as you would like. You should always verify the information in the summary. We are always improving how NetSuite Expert in SuiteAnswers responds. You can help make the answers better by sending us your feedback!

I have the NetSuite app, and SuiteCommerce Advanced, and a few SuiteApps. How do I make sure I get an answer about the right product?

You may have access to more than one NetSuite product or SuiteApp, all of which have release notes and accompanying documentation. To help in your search, use the name of the product or SuiteApp in your query. For example, instead of submitting a generic request, try something like one of the following phrases:

- show me the NetSuite 2025.1 release notes
- where are the release notes for SuiteCommerce Advanced?
- How do I use the Bank Feeds SuiteApp?
- I can't find the Field Service Management documentation

How can I submit feedback on the summary?

Click the thumbs-up icon if you liked the summary. If you want to send feedback, click the thumbs-down icon, enter your comments, and click **Submit**.

I have good luck with my keyword searches. Can I enter keywords in the search box?

Yes, you can still search with keywords in SuiteAnswers. NetSuite Expert in SuiteAnswers won't activate if you only enter one or two words. To get a summary, enter three or more words, as keywords (perhaps inside quotation marks) or ask in the form of a question.

Will NetSuite Expert in SuiteAnswers understand my question if I make some spelling or grammar mistakes?

NetSuite Expert in SuiteAnswers can handle a few mistakes in your query. You can use contractions and common industry terms. If you don't get a good answer, try rephrasing or fixing any spelling errors.

Can I ask questions in a language other than English?

For the best results, you should ask your question or enter your phrase in English only.

Can I ask follow-up questions?

You can ask the same question multiple times, and the AI Summary may vary slightly with each response. However, you can't really ask a follow-up question. NetSuite Expert does not retain any memory of your previous query or queries.

> **Important:** The summarized content is generated using AI. The information provided may not be entirely free of errors or accurate. You should verify the accuracy of the summary by reviewing the source articles. You can also ask NetSuite Customer Support for information about security, access permissions, and similar topics. Oracle NetSuite does not assume any responsibility or liability for the use or interpretation of the content in the summary.

SuiteAnswers FAQ

Review the questions and answers below to learn more about SuiteAnswers. The questions and answers are ordered by topic in the following way:

General Questions

Can I provide feedback about my experience using SuiteAnswers?

To provide feedback, click the **Feedback** button on the main header. To provide feedback about specific SuiteAnswers articles, use the **Was this article helpful?** buttons at the bottom of articles.

How can I suggest improvements or request a feature?

Go to **Contact Support > Create Support Case**. In Step 2, select Request an Enhancement and complete the necessary fields.

Searching

Do I have to search to find Release Notes?

No, you can also click **NetSuite Release Notes** in the menu next to the SuiteAnswers logo in the header.

What is the best way to phrase my question to get the most accurate search results?

Be specific and use keywords. One-word queries return too many results, whilst long sentences return limited results. You can also use advanced search features, such as quotes, to specify a phrase that must be a part of the results. The new filtering options also help narrow down your results. Type-ahead suggestions can also help you to get the results you're looking for.

How many help topics and support articles does SuiteAnswers have?

Currently, there are around 50,000 help topics and support articles in SuiteAnswers.

How can I clear the history of my search queries?

Click Clear History under the Search History list.

Can I search by article ID?

Yes, you can use this method for both text and video-based articles.

Where can I find new feature previews?

New feature previews are available from the Videos page.

How is the reading time in articles calculated?

Our algorithm estimates reading time, taking into account images and other factors.

Support

Where can I find my account number?

Click **Contact Support** on the main header to find your account number.

What does the case quality indicator on the case form do?

It provides a visual prompt to help you provide the optimal level of information for Support to resolve your issue as quickly as possible. It’s not necessary to complete all of the case specific questions but doing so will help us help you most effectively.

Do I need to select a feature from the feature list when creating a support case?

If you know the name of the feature, you can type it into the **Search feature** field.

How can I request a Release Preview account and how do I log in to it?

You can find information about requesting a Release Preview account and the login page at the bottom of the **Contact Support** page.

NetSuite Virtual Support Assistant

Is this a final production version?

This is an early release. The final version will have improved performance and answers, as well as UI changes.

Can the Virtual Support Assistant answer any support question?

The Virtual Support Assistant answers common support questions. It currently covers more than 5000 questions.

What areas of the product can Virtual Support Assistant help me with most?

The Virtual Support Assistant is most knowledgeable in the ERP and SuiteCloud product areas.

What's the best way of asking the Support Assistant a question?

For best results, ask short questions, for example, How can I create a Purchase Order?

What are the benefits of the Virtual Support Assistant?

It provides fast, direct answers and minimizes the need to filter through search results.

How can I provide feedback about the Virtual Support Assistant?

You can access the feedback form through the menu button. For more information, see NetSuite Virtual Support Assistant.

NetSuite Virtual Support Assistant

Watch the following help video to learn about NetSuite Virtual Support Assistant.

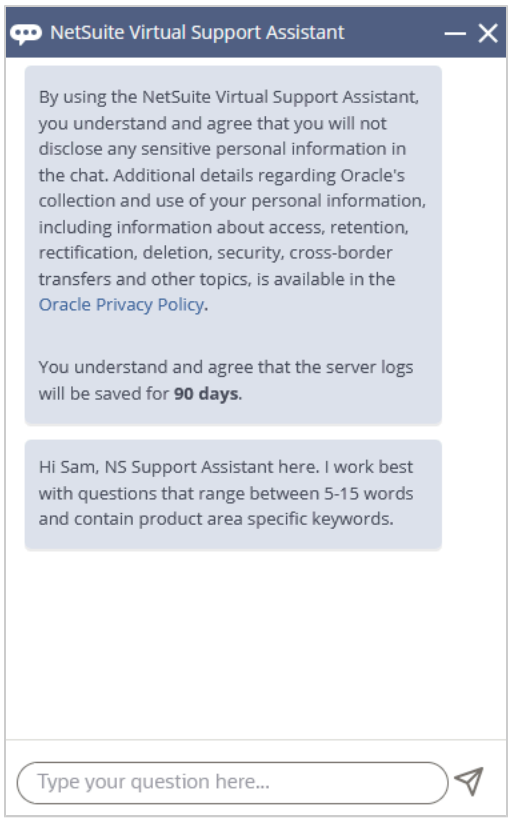
NetSuite Virtual Support Assistant

Accessing the NetSuite Virtual Support Assistant

Access the Virtual Support Assistant by clicking the chat button or from the **Contact Support** page, by clicking **Chat with our NetSuite Virtual Support Assistant** under Online Support.

Using the NetSuite Virtual Support Assistant

The NetSuite Virtual Support Assistant provides answers from SuiteAnswers based on your queries, and high-level answers related to the specific NetSuite product area.



Use the chat box to type in your queries or questions. To submit, press Enter or click Send icon.

The conversation history is saved throughout your session until you close the Virtual Assistant.

From the Menu icon you can access the following:

- **Account Info** – Provides you with information about your account, account name and support type.
- **Virtual Assistant Feedback** – Allows you to submit feedback regarding your experience with the Virtual Support Assistant.
- **Help** – Redirects you to the NetSuite Virtual Support Assistant help article.
- **Privacy Policy** – Redirects you to the Oracle Privacy Policies website at https://www.oracle.com/legal/privacy/.

You can minimize the Virtual Support Assistant by clicking the Minimize button. To reopen the Assistant, click the chat button on the bottom right of your screen. Your conversation history is saved even when you minimize the chat window or refresh the page.

You can submit a feedback to the result by clicking the Rate button when you hover over the result.

Queries

NetSuite Virtual Support Assistant works best with questions that range between 5-15 words and contain product area specific words. When you submit a query, you will get a reply with relevant information. You can click See more to open the full page article. Virtual Support Assistant also provides a list of other articles you may find useful. Click one of the article titles to view a corresponding article in SuiteAnswers.

Your queries can be either questions or simple sentences.

- "What is SuiteCommerce?"

- "How can I create a SuiteBundle?"
- "How do I enable features in NetSuite?"
- "I want to create a saved search."
- "I want to add a new employee."

The Virtual Assistant provides you with support options after it fails to answer your questions three times.

Frequently Asked Questions

I'm getting one of the following messages: 'Hey, Nice to meet you! Allow me a moment to get back to you.', 'I'm still working on your request. Thank you for your patience!'

Try to close the chat window, refresh the page and ask again.

I'm getting an 'Oops I'm encountering a spot of trouble. Please try again later...' message.

Try to ask the question again. If that doesn't help, try to close the chat window, refresh the page and ask again.

Support Assistant may become unresponsive when changing connections during the session.

This may happen when you switch VPN connections in the middle of your sessions. Please make sure you start a new session when you switch connections.

For more questions, see SuiteAnswers FAQ.

Generating a HAR File for Troubleshooting

The authorized NetSuite staff may need additional information about the network requests that are generated in your browser while an issue occurs. You may be asked to record a HAR file while an issue is occurring and provide it for further analysis.

HAR files on Chrome and Microsoft Edge provide more detailed information and help in resolving your issue.

> **Important:** HAR files may contain sensitive information that you submit during recording including personal details and passwords.

To generate HAR file on Chrome:

1. Press **F12**, **Ctrl+Shift+I** or go to More tools>Developer tools.
2. Go to **Network** tab.
3. Make sure the **Record** button in the upper left corner of the Network tab is red.
4. Check the **Preserve log** and **Disable cache** boxes.
5. Reproduce the issue.
6. After you have reproduced the issue, click the **Export HAR** (down arrow icon) to export the HAR file.

To generate HAR file on Edge:

1. Press **F12**, **Ctrl+Shift+I** or go to More tools>Developer tools.
2. Go to settings by clicking the **Settings** button or pressing **F1**.
3. Under **Global** settings check **Auto-open Dev tools for popups**.
4. Go to **Network** Tab.
5. Click the **Clear** button to clear out any existing logs from the Network tab.
6. Press the **play** button at the top left to start recording.
7. Reproduce the issue.
8. After you have reproduced the issue, right-click anywhere on the grid of network requests.
9. Click **Save all as HAR with content**.

To generate HAR file on Firefox:

1. Press **F12** or go to Tools>Web Developer>Network.
2. Reproduce the issue.
3. Right-click on the loaded results.
4. Select **Save all as har**.

To generate HAR file on Safari:

1. Open the **Develop menu** and select **Show Web Inspector**.

   If you don't see the Develop menu in the menu bar, go to Safari>Settings, click **Advanced** and select **Show Develop menu in menu bar**.
2. Click the **Network** tab.
3. Reproduce the issue.
4. Click the **Export** icon on the far right of the network tab and save the HAR file.

NetSuite Support

Oracle provides a variety of resources you can use to find answers to your questions about NetSuite.

From the Support tab, you can access the following:

- **SuiteAnswers** – In the SuiteAnswers portlet, click Go to SuiteAnswers to open the SuiteAnswers page. You can search on the SuiteAnswers page to find support articles, training videos, help topics, and best practice documents on any subject you need help with.

  For more information, see SuiteAnswers Overview.

  From SuiteAnswers, you can also submit a question or issue by email or contact Customer Service by phone. For more information, see Support Cases in SuiteAnswers
- **Support Online** – To submit a question or issue to support professionals, click the Support tab, and click Go to SuiteAnswers. On the right side of the page, click the Contact Support Online button. You can send questions or comments by email 24 hours a day.

  Note that you must be on the Authorized Contact list to be able to submit an online support request.

  You'll get an email response by email as soon as possible. Response times vary depending on the level of support you have purchased and the support team's current case load. To get a faster response,

please provide as much information as possible, and if applicable, include steps to reproduce the problem.

> **Tip:** To improve your experience with NetSuite Customer Support, remember to select your preferred time zone in the Timezone field. The Timezone field is located below the Phone field on the Case Submission form. For Authorized Contacts the value of the field defaults to the time zone set in the Authorized Contact record. You can select a different time zone from the list, if you want to. For Non-Authorized Contacts the Timezone field is blank and you can select a time zone from the list.

- **Support By Phone** – Phone support is available 24/7. Call the number provided by your account manager. Note that you must be on the Authorized Contact list to receive support by phone.

  For quicker assistance, please have your account ID ready when you call. To view your account ID, use one of the following methods:

  - Find your NetSuite account ID at the beginning of the NetSuite URL. For example, if the URL is https://1234567.app.netsuite.com/, your account ID is 1234567.
  - If you're an account administrator, in the NetSuite UI, go to Setup > Company > Company Information. The account ID field is located near the bottom of the right column.
  - In the NetSuite UI, Click the Support tab, and click Go to SuiteAnswers. Then click **Contact Support by Phone**.
  - In the NetSuite UI, right-click the page and select View Source. Scroll to the bottom of the page. The second-last line shows your account ID and your login ID.
- **NetSuite 360** – If your account administrator has provided you a role with access, click the link in the NetSuite 360 portlet. From NetSuite 360, you can view support cases and issues, and contact Support. You can submit support cases and receive responses in English, Chinese (Simplified), French, German, Japanese, Latin American Spanish, and Portuguese(Brazil). Few employees in a company have access to NetSuite 360. For information, see the help topic Accessing NetSuite 360.
- **NetSuite User Group** – You can register for the Oracle NetSuite community at Oracle NetSuite Community Registration FAQ. After you register, visit the site at https://community.oracle.com/community/netsuite. You also can access the user community by clicking the link in the NetSuite User Group portlet on the Support tab of the NetSuite application.
- **Follow NetSuite** – To follow NetSuite on Facebook, Twitter, YouTube, or the official NetSuite blog, click the links in the Follow NetSuite portlet on the Support tab.

You can find the following options on the Setup tab:

- **NetSuite Support Login** – available at Setup > Company > NetSuite Support Login. On this page, select when you want to enable Support to log in to your account: always, never, or for the duration of your case. For more information, see NetSuite Support Login.

  > **Note:** This setting only allows NetSuite Support to access a backup copy of your account in the QA environment to investigate cases you enter. This setting doesn't give NetSuite Support permission to access your production, sandbox, or release preview account.
- **Billing Questions** – To submit a question about your bill, go to Setup > Company > Billing Questions. You can submit billing questions 24 hours a day.

  Your billing questions are answered by email and are prioritized by the level of support you have purchased.
- **Order Forms** – To order envelopes, check forms and other items, go to Setup > Accounting > Order Forms.

In addition to these resources, Oracle also provides NetSuite Help Center and other documentation. The help documentation is available by clicking Help in the upper right corner of any page in NetSuite.

For more information, see Using the Help Center Window.

Other topics included in this section of NetSuite Basics are as follows:

- Accessing NetSuite 360
- Checking the Status of Support Cases
- NetSuite Issue Resolution
- Support Phone Menu Routing Options
- NetSuite Support Login

NetSuite Issue Resolution

The Support team categorizes issues as defects, enhancements, or minor enhancements.

- A **defect** is when a feature doesn't work as intended.
- An **enhancement** is a request for new or improved functionality.
- A **minor enhancement** is a small change to existing functionality.

Defect Resolution Process

Oracle NetSuite's process for handling customer-reported defects has the following goals:

- Resolution of customer-reported defects within a targeted timeframe that's appropriate to each defect's urgency.
- Consistent and clear communication to customers throughout the defect resolution process.

As part of this process, an urgency level to each defect, based on the following key inputs:

- Business Impact – business categorization that measures how much the defect affects operations. Defined levels are B1-B4, with B1 representing the biggest impact.
- Severity - technical categorization that reflects the defect's effect on functionality or performance. Defined levels are S1-S4, with S1 representing the greatest severity.
- Other factors - such as the number of impacted customers, whether the problem is a recently introduced defect, or a sudden change to operational behavior has occurred.

The urgency level of a defect sets the target timeframe for resolution. See NetSuite Issue Resolution Process for an up to date timeframe.

During the resolution process, the Support team communicates the following milestones to impacted customers:

- Assignment of the defect to an engineer
- Assignment of a target date for the release of a fix
- Completion of code review, testing, and authorization to release the fix
- Release of the fix to NetSuite's production environment

The Support team can also provide further assistance as needed. If you want to request additional information or discuss an issue's urgency level, please update your support case for assistance.

For the minor release release schedule, see NetSuite minor release Release Schedule.

Viewing Defects and Enhancements

If you have a role with permission to access NetSuite 360, you can view defects and enhancements associated with your support cases. For more information, see the help topic Accessing NetSuite 360.

On the NetSuite 360 page, click **See Support Issues** in the Customer Center - Home Links portlet to view a list of issues entered for your company. Use the Quick Sort dropdown list to select a subset of issues to display: Recently Created, Recently Modified, or Recently Viewed.

Support Phone Menu Routing Options

When you call Support by telephone or enter an online support case, it's important that you select the correct category for the question or problem you have to ensure that it's routed to the correct support person.

Please review the latest NetSuite Support Phone Menu Routing Options for a detailed map of support case menu routing options. This file also is available by going to the Support tab and clicking the SuiteAnswers portlet. On the right side of the page, click Contact Support by Phone.

NetSuite Support Login

The authorized NetSuite staff may occasionally need to access a copy of your account in an internal QA environment to investigate and fix any cases and issues you have reported. To give you better flexibility and control over how and when you allow the authorized NetSuite staff to have such access, we provide both a company and a case level preference.

The **NetSuite Support Login** preference is a company-wide preference that takes precedence over the case level preference. You can choose from three different access options to your account data.

> **Important:** **The NetSuite authorized staff never accesses live accounts.** This preference is only ever used to give access to a copy of your account in an internal QA environment. We never access any of your live environments such as Production, Sandbox, and Release Preview.

To set the NetSuite Support Login preference

1. An administrator can go to Setup > Company > NetSuite Support Login.
2. Select from one of the following three options:
   - Always - with this permission, the authorized NetSuite staff will be able to access a copy of your account in an internal QA environment to troubleshoot reported cases and issues. Access is granted for any open case during first 90 days. You may need to approve access again after 90 days by re-checking **Allow NetSuite Login for this Case** to reset the timer.
   - Case Duration - with this permission, the authorized NetSuite staff will be able to access a copy of your account in an internal QA environment to troubleshoot reported cases and issues. Access is granted on a case-by-case basis. When a case is created or updated, you must check the **Allow NetSuite Login for this Case** field on the case form to set the 90 days access timer. You may need to approve access again after 90 days by re-checking **Allow NetSuite Login for this Case** to reset the timer.
   - Never - with this permission, the NetSuite staff has no access to copies of your account in internal QA environments.

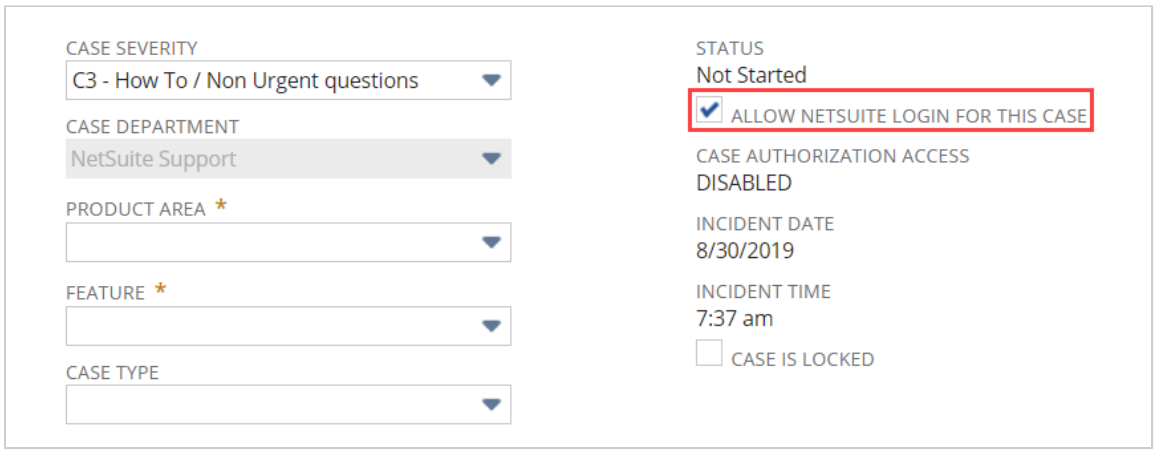
Important: To make sure it works as intended, set the permission in the Production account. Your Sandbox accounts don't keep the permission set when they refresh.

Allow NetSuite Login for a Case

The **Allow NetSuite Login for this Case** field works in conjunction with the NetSuite Support Login preference. You must check this box to allow the NetSuite staff to access a copy of your account for investigating your cases and issues.

To check the **Allow NetSuite Login for this Case** box, you must be logged in to NetSuite 360, which is only available to employees with either the NetSuite 360 or the NetSuite 360 - Plus Financials role. You can access NetSuite 360 through the NetSuite 360 portlet (located on the Support tab). For more information, see the help topic Accessing NetSuite 360.

You can check this box when you create new cases or edit existing ones.



The **NetSuite Support Login** preference takes precedence over the **Allow NetSuite Login for this Case** box on the NetSuite case form.

If the **NetSuite Support Login** preference prevents access, even if the **Allow NetSuite Login for this Case** box is checked, authorized NetSuite staff can't access a copy of your data.

Which option should I choose?

Choosing the most appropriate level of access depends on your company's business requirements to limit how, when, and if authorized NetSuite staff access a copy of your account data in an internal QA environment.

Who are NetSuite Authorized staff?

Authorized NetSuite staff are specific members of the Support, QA, and Development teams, who have been granted permission to access a copy of your account data to troubleshoot and solve your case.

Advanced Customer Support

The NetSuite Advanced Customer Support (ACS) helps you be proactive about optimizing NetSuite.

Business needs change over time—due to growth, evolving strategies, and changing markets. You may find that there is a growing gap between what your business software does and what you need it to do. Or you may need help keeping up with new software enhancements.

NetSuite ACS offers guidance and assistance to help you get the most out of NetSuite. ACS team members are NetSuite product and industry experts who can help you optimize your NetSuite solution.

Key Benefits of ACS:

- Optimize the use and performance of your NetSuite solution
- Collaborate with the world's leading NetSuite experts
- Overcome common business challenges with prescriptive solutions
- Adopt new features from NetSuite releases
- Resolve issues rapidly when you need it most
- Align your business goals with tailored, strategic roadmaps

For more information about Advanced Customer Support, see the following Help sections:

- Advanced Customer Support Services
- Advanced Customer Support Playbooks
- Advanced Customer Support Resources

Advanced Customer Support Services

Advanced Customer Support (ACS) offers four levels of support: Advise, Monitor, Optimize, and Architect. As you move up subscription levels, the amount of engagement, proactivity, and resource expertise increases.

ACS Advise

As the entry-level ACS offering, advise is available for customers who are getting started with NetSuite. Advise has access to NetSuite specialists to provide product guidance and system troubleshooting.

ACS Monitor

Monitor level is designed for established businesses that need hands-on technical and functional support. A designated functional consultant assists with project activities to ensure key milestones are met in a timely fashion.

ACS Optimize

Optimize provides expert solution management for a deeper and more proactive engagement. You partner with a designated Customer Success Manager (CSM) to ensure strategic milestones are accomplished and work with a functional consultant to optimize your solution.

ACS Architect

For enterprise businesses with complex international or subsidiary configurations, Architect delivers a best-in-class solution designed for optimal scalability and performance. Architect also provides comprehensive support with a senior CSM and a named team of expert technical, functional, and support resources.

Advanced Customer Support Playbooks

Advanced Customer Support (ACS) Playbooks guide organizations along their growth journey with expert direction and leading practices based on over 20 years of experience. ACS Playbooks offer a set

of prescriptive services to help overcome business challenges and support key growth milestones with NetSuite.

The following ACS Playbooks are exclusively available to ACS Optimize and Architect customers:

Financial Management

Improves operational efficiencies by optimizing key financial methodologies such as:

- Planning and budgeting
- Forecasting
- Accounts payable and accounts receivables automation
- Revenue recognition
- Month-end closing

Human Capital

Simplifies key processes with HR, such as:

- Payroll
- Workforce management
- Compensation
- Performance management
- Onboarding new employees

Supply Chain Operations

Increase efficiencies across the supply chain in areas such as:

- Inventory and warehouse management
- Demand and supply planning
- Outsourcing
- Procurement
- Production management

Customer 360

Improves customer engagement tactics around deploying:

- Unified ecommerce experience
- Mobile and point of sale revenue streams
- Customer relationship management
- Order management
- Customer analytics reporting

Project Profitability

Simplifies key project-related processes, such as:

- Project accounting and billing

- Project and resource management
- Timesheet and expense management

International Expansion

Handles the financial complexities of entering international markets with guidance on:

- Operating in multiple countries
- Managing multiple currencies and languages
- Tax compliance
- Bank automation
- Localization

Performance and Risk Management

Ensures NetSuite maintains peak performance and security as the business scales, providing guidance on:

- System architecture
- Capacity planning
- Integrations
- Access controls
- Environment management
- Script reviews

Capital Markets

Prepares for a public listing or merger/acquisition by establishing and optimizing required governance and internal controls or developing the financial reports needed to comply with audit requirements and tax regulations.

Cross-Functional

Leverages the power of NetSuite ensuring cross-functional processes, like quote to cash and procure to pay remain optimized.

Industry

Optimizes business functions through NetSuite's more than 20 years of industry-specific KPI's and insights across industries - retail, software, services, manufacturing, wholesale distribution, and more.

Advanced Customer Support Resources

If you would like to learn more about Advanced Customer Support (ACS), contact your Account Manager. Your Account Manager can answer your questions and help you find the right ACS solution for your business needs.

To learn more about ACS, see the following links:

- Advanced Customer Support

- What is NetSuite Advanced Customer Support Video
- Using ACS to Maximize the Value of an ERP Investment
- New Advanced Customer Support Playbook Help Pave the Way for Business Growth

NetSuite Communities (User Groups)

Join a NetSuite community to communicate with other customers and Certified Consultants to ask questions and trade tips. As a community member, you can start or join discussions with other users. The communities are monitored by NetSuite Certified Consultants and Support Specialists to ensure that you're receiving the best advice.

Anyone with a current NetSuite account can join our community. Users with Center roles, such as Customer Center, Partner Center, and Vendor Center, are not eligible for membership. NetSuite communities aren't available to users of Test Drive accounts.

To register for the NetSuite Community:

1. See the Oracle NetSuite Community Registration FAQ.
2. Follow the instructions on this page to join the Oracle NetSuite community.

After you register, you can go directly to the Oracle NetSuite community site at https://community.oracle.com/community/netsuite. The site has a banner at the top with tips and an introductory video. You also can access the user community by clicking the NetSuite Community link on the Support tab of the NetSuite application.

Regional user groups provide other NetSuite community resources that are hosted and owned by third parties. You can find these by searching for 'NetSuite user groups' in your browser.

SuiteSuccess

Your NetSuite account may be configured using the SuiteSuccess methodology. This methodology uses a value-driven dashboard model to improve the efficiency and effectiveness of NetSuite users. With SuiteSuccess, you'll get predefined components based on leading practices, specific to your company's industry and your users' roles.

Your SuiteSuccess account includes the following components tailored for your particular industry:

- Business processes delivered through NetSuite SuiteApps
- Center tabs
- Chart of accounts
- Dashboards
- Enabled features necessary for your business
- Forms
- KPI scorecards
- Modules
- Predefined preferences
- Reports
- Roles
- Saved searches

SuiteSuccess editions are currently available for the following industries:

- Apparel, Footwear, and Accessories
- Financials
- Food and Beverage
- Health and Beauty
- Non-Profit
- Retail and Hospitality
- Software
- Wholesale Distribution

For more information, see http://www.netsuite.com/portal/services/suitesuccess.shtml or contact your NetSuite account manager.

Voting for Enhancements

When you want a feature or functionality added to NetSuite, visit SuiteIdeas to submit a new enhancement request or vote for an existing idea. You must have the NetSuite Support Center role or the NetSuite Support Center (Basic) role to access SuiteIdeas.

From the Support tab, use the SuiteIdeas portlet to visit SuiteIdeas and search through all existing NetSuite enhancement requests. Vote for the ideas you like, or enter your own ideas to make NetSuite better.

To search and vote for enhancements:

1. Go to the **Support** tab, and click **Go to SuiteIdeas** in the SuiteIdeas portlet.

   Note: If you don't see the **Go to SuiteIdeas** button in the SuiteIdeas portlet, ask your account administrator if you can be given access. See the help topic Accessing NetSuite 360.

   The SuiteIdeas site opens in a new tab or window, depending on your browser preferences.
2. Click one of the following links within the SuiteIdeas site:
   - **Search** to see if your idea has been requested by others.
   - **Browse** for ideas by categories.
   - View new ideas, the most recently updated ideas, and ideas that have received the most votes.
   - View the ideas you have voted for.

     Click an idea to open it in a new window.
3. If you find the idea you're looking for, click **Vote for this Idea**.
4. Rate the idea, and click **Submit Vote**.

If you don't find the idea you're searching for, you can enter your own.

To enter a new idea:

1. Click **File a New Idea** on the SuiteIdeas home page.
2. Enter a description of your idea, and click **Search Idea**.
3. Review the list of search results to see if your idea has already been entered.
4. If your idea isn't in the list or results, click **File a New SuiteIdea** at the bottom of the page.

5. Enter a title for your idea.
6. Select the product area and feature your idea is related to.
7. Enter a detailed description of your idea.
8. Click **Submit Idea**.

Each SuiteIdea is reviewed, and after it's approved, it's listed and can be viewed and voted on by other NetSuite users.

Important: When you're finished with SuiteIdeas, return to your original NetSuite tab or window. The Support tab changes to NetSuite 360 when you go to SuiteIdeas. To exit NetSuite 360 and return to your previous NetSuite center, click **Return to Previous Role** in the upper right corner.

Note: Your idea gets Enhancement Request number after it has been submitted and reviewed.

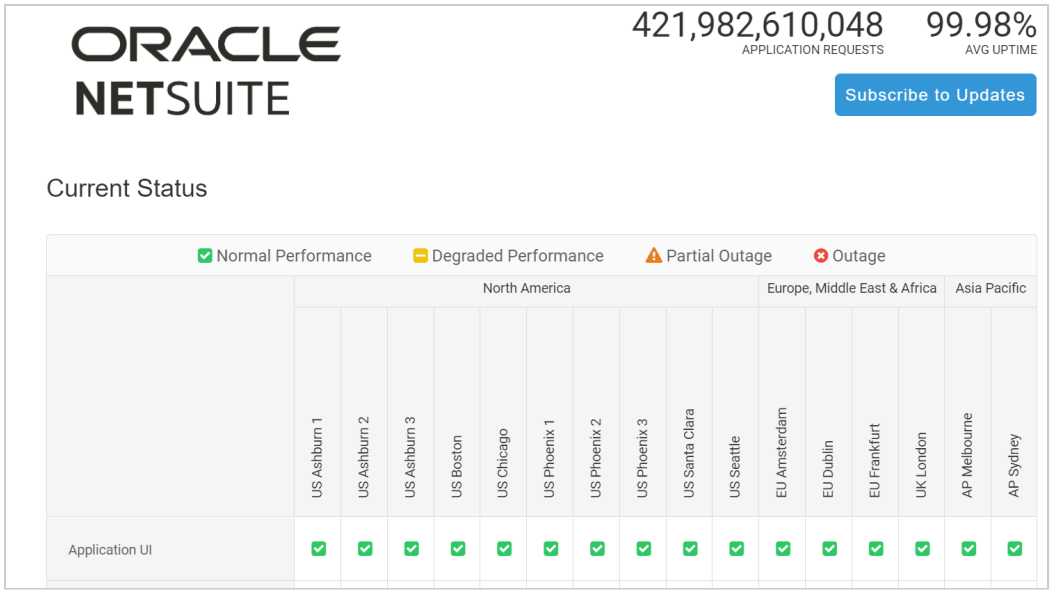
Checking NetSuite System Status

The NetSuite Service Status Page is a communication tool used to inform you of service interruptions, degraded performance, and unplanned outages. If you can't access the NetSuite user interface at https://system.netsuite.com, you can check the service status at https://status.netsuite.com.

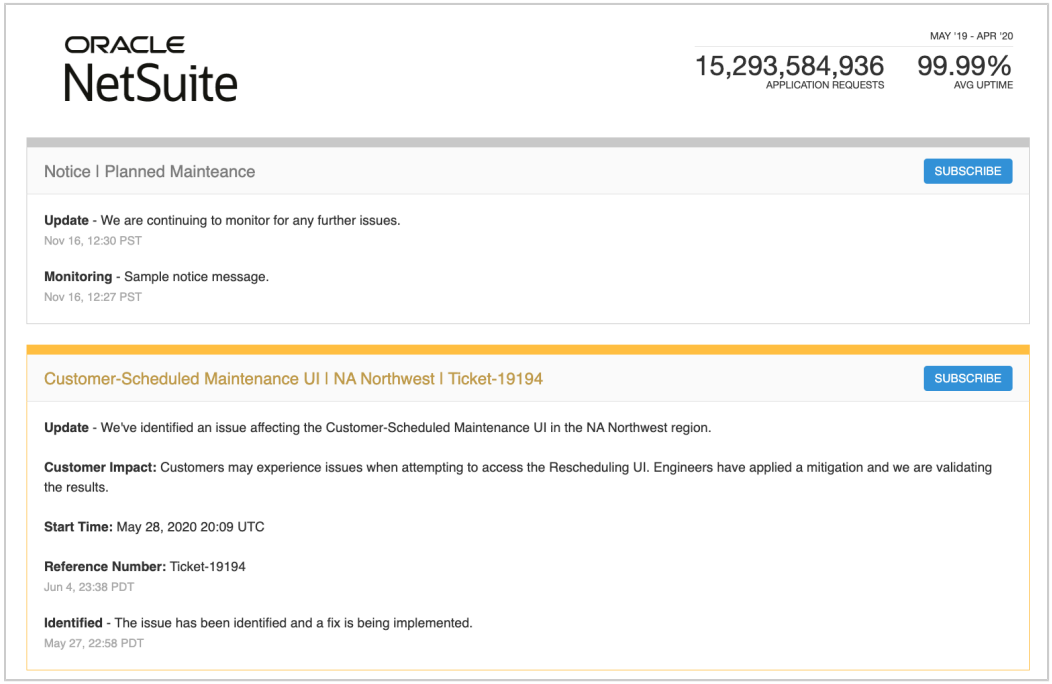
The status page includes the following sections:

- **Metrics**: View the total number of application requests made and the average uptime across the NetSuite service over a rolling 12-month window, updated monthly.
- **Subscribe to Updates**: Click Subscribe to Updates to receive email or phone updates regarding incident reports that are published to the status page.
- **Current Status**: View the current status of NetSuite services across the different data center regions.

Note: To find your data center, go to Setup > Company > Company Information. For more information, see the help topic Enter Basic Company Information.



- **Event Reports**: View reports that describe downtime events or service notifications. Downtime events are service interruptions, defects, and outages that affect NetSuite performance or availability. Service notifications provide more information about ongoing events or security concerns. In both cases, posts are updated with the time of event resolution. To receive notifications only for a specific event, click Subscribe next to the event report.



- **Event History**: View a history of event reports published to the status page in the past 30 days.

The NetSuite services displayed on the status page are:

1. **Application UI**: NetSuite user interface
2. **SuiteCommerce - Websites**: web stores running on NetSuite
3. **SuiteCommerce - Checkout**: web store checkout processing
4. **Email**: email infrastructure
5. **Asynchronous Services**: backend processes, for example, ERP processes and SuiteScript processors
6. **SuiteTalk**: SOAP Web Services, REST Web Services, and partner integrations
7. **SuiteAnalytics Connect**: ODBC, JDBC, and ADO.NET connections to NetSuite data
8. **SuiteAnswers**: NetSuite self-service support site

For details about the Oracle NetSuite service level commitment, see the Service Level Commitment document.

Status Icons

NetSuite services fall into one of four statuses and are indicated by the status icons below: Normal Performance, Degraded Performance, Partial Outage, and Outage.

Status Icon	Meaning	Examples
✅	Normal Performance	No issues affecting any NetSuite accounts.

Status Icon	Meaning	Examples
	Degraded Performance	No service interruption, but there may be performance issues.
	Partial Outage	There is an issue that impacts only a subset of NetSuite accounts.
	Outage	There is a system-wide issue impacting all NetSuite accounts.

How to Subscribe to Updates

Click the **Subscribe to Updates** button to opt in to receive email or SMS notifications about the status of NetSuite services. Provide your email address or phone number, and then you can choose to subscribe to all updates, or to updates for specific data centers and NetSuite services.

You'll receive a notification prompting you to confirm the subscription. When you've confirmed, you'll receive a subscription confirmation message.

How to Unsubscribe from Receiving Updates

You can unsubscribe by clicking the Manage your Subscription link in any of the notifications that you receive from the status page. You'll receive a notification confirming that you have unsubscribed successfully.

For subscription help, please contact NetSuite Customer Support.

Finding Your NetSuite Release Version

The version of NetSuite that you're currently using is displayed on your Home page.

To find the version of NetSuite your company uses:

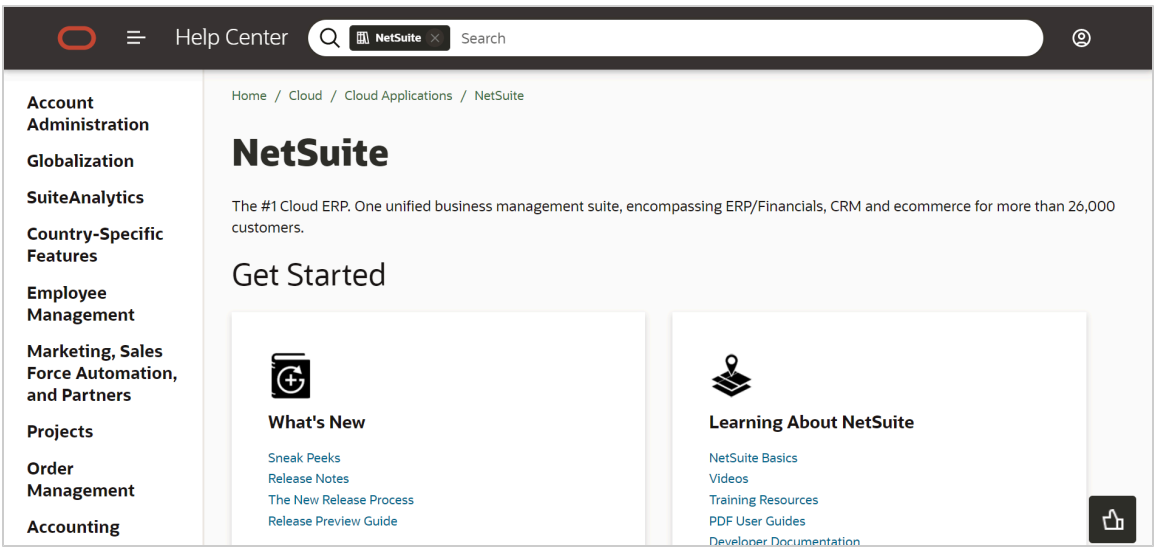
1. Log in to NetSuite.
2. On the Home page, scroll down to the bottom of the page.
3. Find the NetSuite version number in the page footer. The version number should look like this: NetSuite (Edition: United States) Release 2020.1 Copyright © NetSuite Inc. 1999-2020.

Oracle Help Center

The NetSuite Help Center content can also be viewed in its entirety in the NetSuite Applications Suite section of the Oracle Help Center. The Oracle Help Center has a fresh look and feel, and you can access it without logging in to NetSuite.

When you search through the Oracle Help Center for NetSuite topics, keep the NetSuite filter in the search bar. If you don't see the NetSuite filter, you can add it using the menu in the upper left header of the page. Go to Cloud Applications > NetSuite Applications.

This site is available through docs.oracle.com. To access it, use the following link: Oracle Help Center.


Help Center
NetSuite
Search
Account Administration
Globalization
SuiteAnalytics
Country-Specific Features
Employee Management
Marketing, Sales Force Automation, and Partners
Projects
Order Management
Accounting
Home / Cloud / Cloud Applications / NetSuite
NetSuite
The #1 Cloud ERP. One unified business management suite, encompassing ERP/Financials, CRM and ecommerce for more than 26,000 customers.
Get Started
What's New
Sneak Peeks
Release Notes
The New Release Process
Release Preview Guide
Learning About NetSuite
NetSuite Basics
Videos
Training Resources
PDF User Guides

Navigating NetSuite

Watch the following video to see the common elements and tools of the NetSuite user interface (UI).

Navigating NetSuite

This section introduces you to the elements of the NetSuite user interface (UI). It includes topics for common UI elements and tools.

The UI uses progressive disclosure. This means that the pages focus on your content. When you move your pointer over areas of a page, the links, menus, and icons that are appropriate for that area appear. If you don't see a link or button you expect, move your pointer around the area and see what appears.

It's best to always use the NetSuite Back button for navigation, instead of the Back button in your browser. If you use the browser Back button, you may create duplicate entries.

Instructions for common UI elements and tools are included in the following help topics:

- Header and Menus
- Centers
- Dashboards
- Global Search
- Create New Menu
- Popup and Dropdown Lists
- QuickViews
- Keyboard Shortcuts
- Buttons and Menus in NetSuite
- Text Enhance

If you're using NetSuite on a mobile device, see the help topic NetSuite for Mobile Overview.

Finding Your NetSuite Account ID

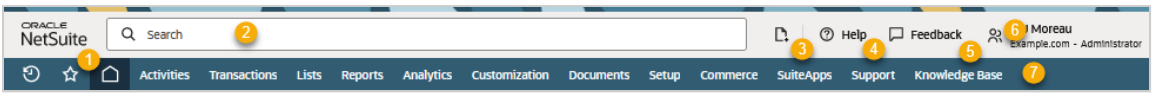
You don't need to know your NetSuite account ID to use NetSuite. In special cases, however, you may want to know what your account ID is.

You can find your NetSuite account ID at the beginning of the NetSuite URL. For example, if the URL is https://1234567.app.netsuite.com/, your account ID is 1234567.

Account IDs for Sandbox and Release Preview accounts contain an underscore, for example 123456_RP. In the account-specific domain URL, the underscore becomes a hyphen and the capital letters of the acronym become lowercase letters. For example, the URL for a Sandbox account may look as follows: https://1234567-sb.app.netsuite.com. For more information, see the help topic URLs for Account-Specific Domains.

Header and Menus

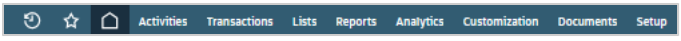
The header area of NetSuite pages is locked and always remains accessible at the top. The following screenshot shows the elements of the header.



1	**Oracle NetSuite logo** – If you're having issues with performance in NetSuite, you can double-click the Oracle NetSuite logo to open a popup window with details that your administrator can use to find the problem. For more information, see the help topic Gathering Performance Details.
2	**Global search field** – Enter a keyword to search for any type of record. For more information, see Global Search.
3	**Create New menu** – Use this dropdown menu to create new records of various types. For more information, see Create New Menu.
4	**Help** – Click Help to open the NetSuite Help Center. The help center usually opens to a topic related to the page you're working with. For more information, see Getting Help.
5	**Feedback** – Click Feedback to rate your experience with NetSuite. Choose your satisfaction level, enter any comments (optional), and click **Submit**.
6	**User name and role** – Move your pointer over this area to open a dropdown list to change your role or log out of NetSuite. For more information, see Roles and Accounts.
7	**Navigation menu bar** – This bar contains tabs that become navigation menus when you hover over them. For more information, see Navigation Menu.

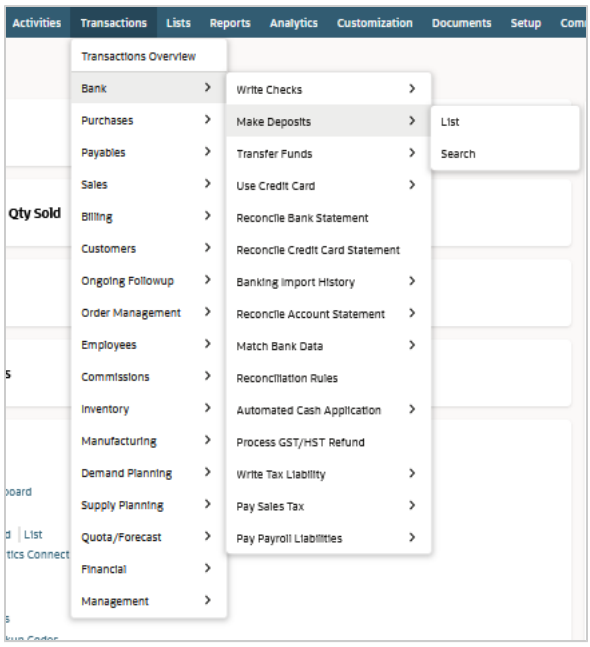
Navigation Menu

The navigation menu bar is located at the bottom of the header. The tabs in the bar depend on your user role. Users with the Administrator role and users with the Custom Center Tabs permission can create new tabs. For more information, see the help topic Creating Center Tabs.



Notice the ellipsis at the right end of the menu bar. It appears when the page is too narrow to display the full menu. The ellipsis means that more menus are available. When you hover over the ellipsis, the additional menus drop down so that you can access them without scrolling.

All of the tabs automatically expand to become navigation menus when you move your pointer over them. Navigation menus often have multiple levels. Hover over a menu to display submenus, and click a menu option to select it. For example, pointing to the Transactions tab displays the Transactions menu. In the following screenshot, the pointer has followed the Transactions menu to the Bank submenu, then to the Make Deposits menu, and is pointing to Search.



When you select a menu option, the tab remains highlighted to show you the context of the page you're on.

Three of the tabs on the navigation bar use icons instead of words. These are:

- **Recent Records** – NetSuite remembers the records you have viewed recently. Click this icon to open a dropdown menu of recent records. For more information, see Using the Recent Records Menu.
- **Shortcuts** – When you click this icon, you open the shortcuts menu. It contains links to your most frequently used records, transactions, lists, or reports. These shortcuts also appear in the Shortcuts Portlet. Often your administrator sets them up for you. For more information, see the help topic Shortcuts Portlet.
- **Home** – Click this icon to go to your home dashboard page. When you hover over it, you can also see a link to the Set Preferences page. For more information, see Dashboards.

Note: Your personal settings and preferences are accessible from the Settings portlet on your Home page dashboard. For more information, see Settings Portlet.

Roles and Accounts

A role is a set access configuration that's assigned to you. Roles and their permissions affect what pages you can see in the NetSuite and what tasks you can complete. You may have more than one role assigned to you. If you have more than one role, you can switch between roles and select a default role in your account to use when logging in. For more information about roles, see the help topic NetSuite Roles Overview.

An account is a place where you work in NetSuite. NetSuite offers multiple types of accounts you can use, such as production, sandbox, development, and release preview. The live production account is the main account where you do the daily work necessary to run your business. You can access your production account at system.netsuite.com by entering your login details. To know more about different types of accounts, see the help topic Understanding NetSuite Account Types.

Note: Only administrators can set up and manage roles and give access to accounts. For more information, see the help topic NetSuite Users & Roles.

Switching to a Different Role or Account

If browser history is available, when you log in to NetSuite, you're logged in with the role you used when you logged out of NetSuite. You may want to switch to a different role, or switch to a role in a different account.

On NetSuite pages that ask you to select a role or an account, you can see choices available to you. You may see these pages when you're logging in, or when you're switching roles.

- Role and account selection pages and menus are organized into two sections:
  - The upper section shows the roles available to you in the current account.
  - If you have access to more than one account, your other accounts are listed below a **Or switch to another account** section. The roles available to you in these accounts are not shown in this lower section. When you switch to another account, the upper section shows your roles in that account.
- If you have access to more than one NetSuite account, you can select a default role for each account. For example, you could set a default role for production, sandbox, and Release Preview. For more information, see Specifying a Default Role.

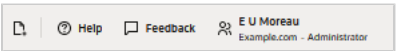
See the following sections for more information:

- Switching to a Different Role
  - Logging in to the NetSuite UI
  - Hiding an Account
  - Opening the My Roles Page
  - Hiding a Role
  - Showing Hidden Roles
  - Specifying a Default Role
- Switching to a Different Account
  - Hiding an Account
  - Showing Hidden Accounts

Switching to a Different Role

The role that you use affects what pages and records you can access in NetSuite. You may have more than one role in NetSuite.

The upper-right corner of every NetSuite page shows your name and current role.



- Hover your cursor over this area to see the Change Roles list.
- Click this area to go to the My Roles page.

To switch to a different role:

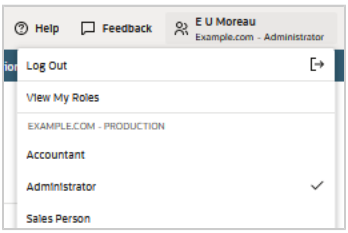
1. Find your name and role in the upper-right corner of the NetSuite page.
2. Hover to open the **Change Roles** list.

   A check mark indicates your current role.

3. Select the role you want to use.

   If a company name is associated with the role, you'll see it on the page.

   > **Note:** The Role section shows only roles available in the current account. If you're looking for a role in a different account, select the account in the **Or switch to another account** section to view the roles in that account. Sandbox accounts are indicated by an SB icon, and Release Preview accounts are indicated by an RP icon.



Opening the My Roles Page

On the My Roles page, you can switch to another role or another account. You can also hide a role from view, show all your hidden roles, and set a default role for the current account.

To open the My Roles page:

1. Click your name and role in the upper-right corner of any NetSuite page.
2. See the following topics for more information.
   - Hiding a Role
   - Showing Hidden Roles
   - Specifying a Default Role

Hiding a Role

When you hide a role, it only disappears from your view. You don't disable the role.

To hide a role:

1. Open the My Roles page. For more information, see Opening the My Roles Page.
2. In the row of the role you want to hide from view, hover over the More icon ··· on the right side of the page.
3. Select **Hide**. The role disappears from the Role list.

   > **Note:** If you hide your current role, it stays in the Role list and a Hidden icon marks it as hidden.

4. To see your changes in the Change Roles list, refresh your browser and open the Change Roles list.

Showing Hidden Roles

You can see any roles that you previously hid from view by clicking **Show All** in the upper-right corner of the My Roles page.

To show hidden roles:

1. Open the My Roles page. For more information, see Opening the My Roles Page.
2. Click **Show All**.
   - To show a role, hover over the More icon ··· and select **Show**.
   - To remove your hidden roles from view, click **Show All** again.

Specifying a Default Role

If you don't set a default role in an account, your browser logs you in with the last role you used. However, if you want to set a default role, you can do this on the My Roles page.

To set a default role in an account, first you select the account, then you select the role in that account that you want as default.

> **Note:** You can set only one default role in an account, but you can set up a default role in each account you can access.

To specify a default role:

1. Open the My Roles page. For more information, see Opening the My Roles Page.

   > **Note:** The Roles section shows only the roles in your current account. To set a default role in a different account, select that account in the **Or switch to another account** section. Then you can see the roles available in that account.

2. In the row of the role you want to make default, click the More icon ··· on the right side of the page.
3. Select **Make Default**. Your default role preference for this account is saved.

Switching to a Different Account

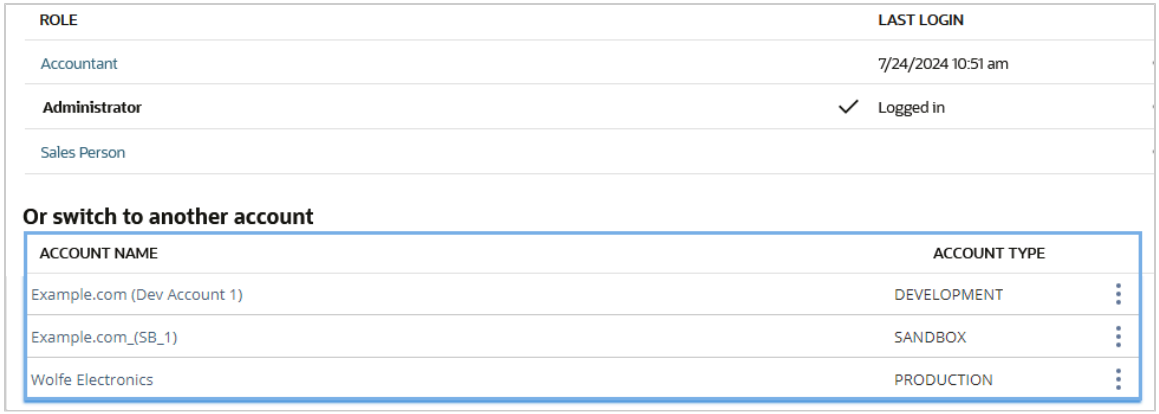
You can access all your accounts from the Change Role list or from the My Roles page, including your production, sandbox, Release Preview, and development accounts. To open the My Roles page, click your current role in the upper-right corner of the NetSuite page.

On the My Roles page:

- Your current role is shown in bold with a check mark, and **Logged in** in the Last Login column.

- To reorder your accounts, click the **Account Name** or **Account Type** column header. You can sort the columns in ascending order or descending order.
- To see the account order changes in the **Change Roles** list, refresh the browser and open the **Change Roles** list.

- The ordering of accounts is the same in all accounts you can access.
- Your preference for ordering accounts is stored in your browser. If you use a different browser or device to access NetSuite, you'll need to sort the columns again for that browser or device.



Hiding an Account

When you hide an account, it only disappears from your view. You don't remove your access to the account.

To hide an account:

1. Open the My Roles page. For more information, see Opening the My Roles Page.
2. In the row of the account you want to hide hover over the More icon ··· on the right side of the page.
3. Select **Hide**.
4. To see these changes in the Change Roles list, refresh the browser, and open the Change Roles list again.

Showing Hidden Accounts

You can see any accounts that you previously hid from view by clicking **Show All** on the upper-right corner of the My Roles page.

To show hidden accounts:

1. Open the My Roles page. For more information, see Opening the My Roles Page.
2. Click **Show All**. A **Hidden** icon identifies any hidden accounts.
   - To show an account, hover over the More icon ··· and select **Show**.
   - To remove your hidden accounts from view, click **Show All** again.

Centers

A center is a set of tabbed pages that changes based on your role. There are different types of centers in NetSuite, including standard centers, and NetSuite 360. Each NetSuite center provides the pages and links that you need to do your job. For example, the Accounting Center's tabbed pages provide data and links that are relevant for Accountants, Bookkeepers, Payroll Managers, and Clerks. For more information about the standard centers, see the help topic Centers Overview.

Each tabbed page displays a collection of real-time data called a dashboard. You can personalize your dashboard and see dashboards that are published by administrators. For more information, see Dashboards.

When you log in to NetSuite, the system determines your last used role and account, or a default role that you set up, and displays the associated center. For more information, see Roles and Accounts.

SuiteSuccess customers have predefined centers for their users. SuiteSuccess uses a holistic approach to product adoption. Extensive product experience, domain knowledge, and leading practices dictate the built-in business process flows and KPIs that are provided for a specific business and industry. SuiteSuccess customers have custom roles and centers that are appropriate for their edition of SuiteSuccess. The role-based user dashboards provided enable you to meet your business needs more effectively.

Some pages are included in all centers and accessible to all roles. For more information, see Pages Common to all Centers.

If you have a role with the Administrator or the Custom Centers permission, you can customize the user interface of a center. For more information, see the help topic Custom Centers.

Pages Common to all Centers

The following pages (or tabs) are included in all centers and are accessible to all roles:

- The Home Page
- The Activities Page

The following pages (or tabs) aren't included in the Customer Center, Employee Center, Partner Center, or Vendor Center, but are included in all other centers and accessible to all other roles:

- The Documents Page
- The Setup Page

The following pages (or tabs) aren't included in the Customer Center, Employee Center, Partner Center, Vendor Center, Advanced Partner Center, or Support Center but are included in all other centers and accessible to all other roles:

- SuiteApps

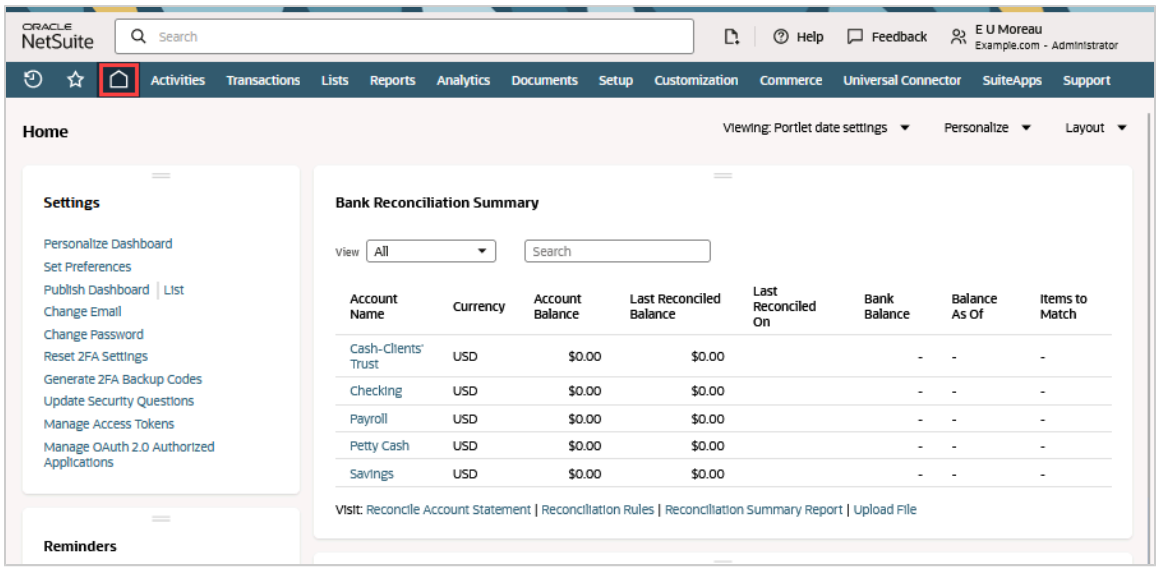
The Home Page

The Home page displays every time you log in to NetSuite.

Some of the features of the Home page are:

- A quick search tool by type of record
- Key Performance Indicators that show the business statistics most important to you
- Shortcuts that link to the areas you use most
- Reminders that alert you to important things that need to be done
- Settings that include:
  - Adding information to your Home page
  - Individual preferences for working throughout the entire NetSuite application
  - A tool for synchronizing events, contacts, and tasks
  - A link for changing your email and password

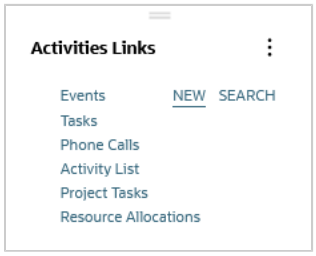
To set up your Home page, click Personalize. In the Add Content panel that appears, you can choose the other content items to add to your dashboard.



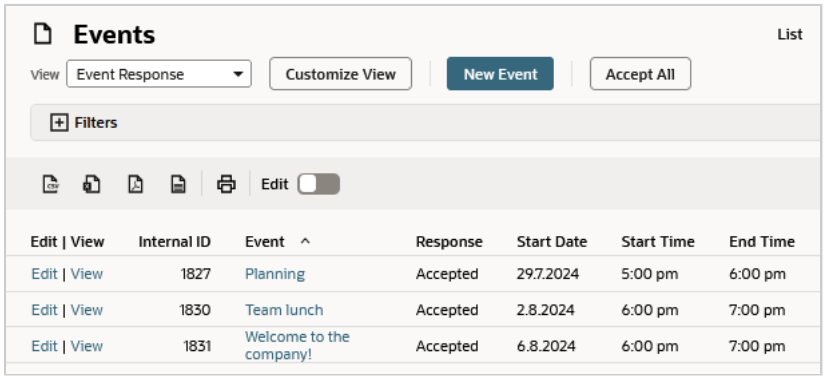
The Activities Page

The Activities page shows your calendar, events, tasks, and phone calls, and other activities. You can customize this page by adding individual portlets such as Phone Calls, Tasks, Activities Links, Calendars, Quick Add: New Events, and more. For information about personalizing your dashboard, see the help topic Adding a Portlet to a Dashboard.

For example, the Activities Links portlet provides links to quickly access various activity list pages. You can also create new records (for example: events, tasks, and phone calls) or search existing activity records.



On list pages, you can customize your view, filter the listed records, create new records, and perform other actions as appropriate for the record. Clicking **Events**, for example, displays a list page of your events. Your first day on the job, it might look like this:



You can view your calendar and scheduled events using the Calendar portlet. For more information, see Navigating Your Calendar.

In the Tasks and Phone Calls portlets, you can quickly create new tasks or phone calls, or edit existing records.

To reorganize the portlets on the page, click and hold the upper right corner of the portlet and drag it to where you want it positioned on the page.

For more information about the various types of activities and records on this page, see:

- Working with Your Calendar and Activities
- Working with Events
- Working with CRM Tasks or Project Tasks
- Working with Phone Calls
- Attaching Events, Tasks, and Calls to Records and Transactions

The Documents Page

The Documents page and navigation menu allow you to manage your documents and templates.

You can click the Documents tab or Documents Overview menu to access the NetSuite File Cabinet, where you can store and organize your business documents online and then associate them with company, customer, contact, vendor, other name, partner, task, event and case records.

In the File Cabinet, you can quickly search for, download, move, and delete existing files. You can also use Add buttons to upload additional files to the File Cabinet. For more information, see File Cabinet Overview.

Additional menu items on the Documents page include:

- Files
- Templates has the following menu items:
  - Email Templates: see the help topic Working with Email Templates.
  - Fax Templates: see the help topic Using Fax Templates.
  - Letter Templates Using Letter Templates.
  - PDF Templates: see the help topic Advanced PDF/HTML Templates
  - Select Template Files to access the template files in the File Cabinet.

  For more information, see the help topic Working with Email Templates.

Available menu items vary based on the features you've enabled in your account. If Mail Merge is enabled in your account, see the help topic Working with Mail Merge.

The Setup Page

The Setup page is where NetSuite account administrators (and other users with a role granting permission) manage the details of your NetSuite account. The menu items available on the Setup page depends on your assigned role and permissions. If you aren't an account administrator, many setup tasks are unavailable to you. Some menu items available on the Setup page are only available for specific roles. See the following topics for information about Setup page menu items.

- **Company**: see the help topic Set Company Preferences.
- **Accounting**: see .
- **Sales**: see the help topic Setting Up SFA.
- **Marketing**: see the help topic Setting Up Marketing.

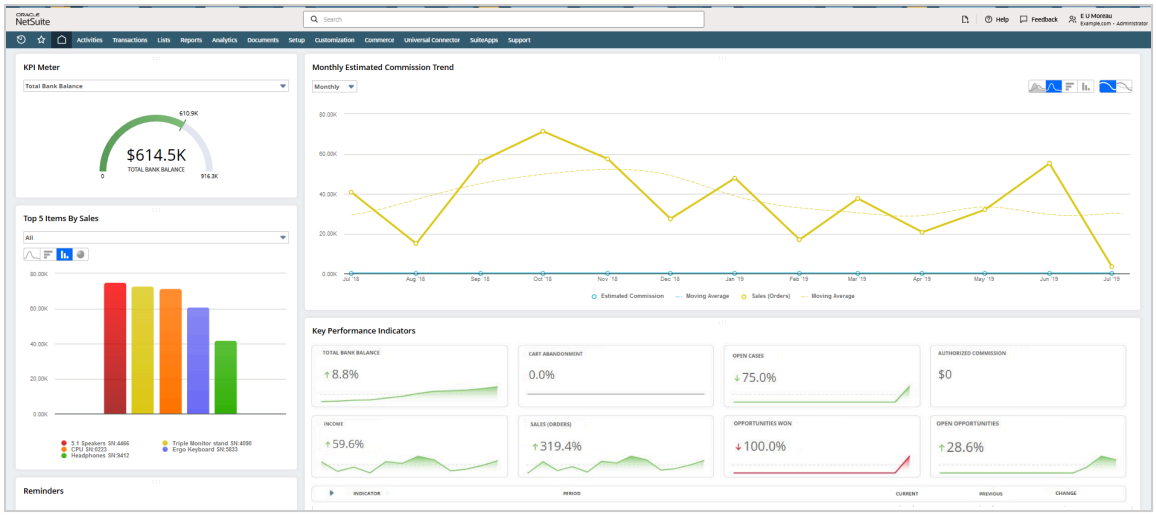
- **Support**: see the help topic Support Management.
- **Issues**: see the help topic Issue Management. In particular, see the help topic Setting Issue Management Preferences.
- **Import/Export**: see the help topics CSV Imports Overview and Additional Import and Export Options.
- **Users/Roles**: See the help topic NetSuite Users & Roles.
- **Integration**: see the following topics:
  - Company-Wide Preferences
  - Using the SOAP Web Services Usage Log
  - SOAP Web Services Security

You may also see the following menu items on the Setup page, depending on what features are enabled in your account.

- **Payroll**: depending on which payroll feature your company is using, see either SuitePeople U.S. Payroll or Payroll Solutions.
- **Customization**: see the help topic Customization.
- **Site Builder**: see the help topic SuiteCommerce Site Builder. See also Site Builder Overview.

Dashboards

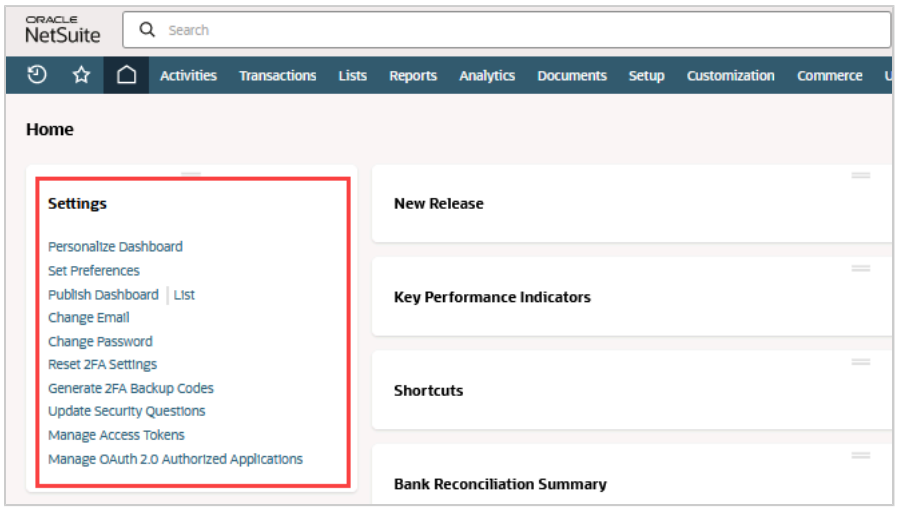
When you log in, NetSuite opens your home page. Your home page is a **dashboard**, a collection of real-time data. The specific content of your home page depends on your user role. Here is an example of a portion of a Home page for a fictitious company.



Dashboard content is displayed in a variety of **portlets**, dynamic data display windows. Some portlets provide direct access to raw data, and others display data that has been synthesized into critical business metrics, such as key performance indicators (KPIs), performance scorecards, trend graphs, and report snapshots. For more information, see the help topic Dashboard Portlets.

Settings Portlet

Links to your personal settings, preferences, and login information are included in the Settings portlet on your NetSuite dashboard. By default the Settings portlet is in the lower left of the dashboard as shown in this screenshot of a Home page with all portlets minimized except the Settings portlet.



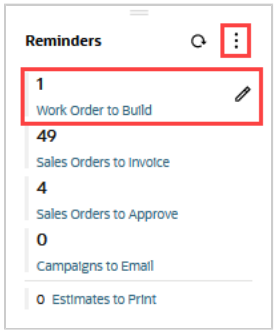
Your Settings portlet might contain more links than are shown here. Some links depend on your role and the features that are enabled in your account. You can't delete this portlet, but you can move it to a different location on the dashboard.

For more information about the standard links in the Settings portlet, see the following topics:

- Dashboard Personalization
- Setting Personal Preferences
- Change Email Link
- Change Password Link
- Update Security Questions Link

Portlet Controls

Portlet controls are hidden until you move your pointer over the portlet. For example, look at the following screenshot of a Reminders portlet with a pointer in it. The menu icon appears on the right of the title bar. The title of the record that the pointer is over is underlined to show that you can click to view the record. An Edit link or icon also appears to the right of the record name so that you can reopen the record in edit mode.



Portlets with content from current data include a icon on the right of the title bar. Click the icon to refresh the portlet content and ensure it includes the latest data.

You can rearrange the portlets on your dashboard to fit your needs. For instructions, see the help topic Arranging Dashboard Portlets.

To minimize a portlet, click its title bar. When you move your pointer over the title bar, it changes to crossed arrows. To maximize the portlet, click again.

Additionally, you can expand some portlets to full-screen view by clicking the double arrow icon . For some of the portlets, the full-screen view displays more columns and rows in the search.

Global Search

The NetSuite global search tool enables you to find any type of record from a single keyword query. Global search is often the quickest way to locate data in NetSuite.

The global search box is prominently located near the center of the header. The header is anchored at the top of the page so that it's always accessible. The keyboard shortcut Alt+G moves the cursor into the search field.

Keywords in global search can include letters, numbers, dashes, underscores, and the % wildcard. The colon (:) and the caret (^) are prefixes that limit the search to a specific record type. All other characters are considered white space. For details about prefixes, including some examples, see the help topic Global Search Prefixes. For more information about the % wildcard, see the help topic Tips for Effective Global Searches.

Keywords should be between three and 32 characters long. Global search starts as soon as you type three characters, and anything over 32 characters is ignored.

By default, global search provides a list of suggested matches as you type. You can select a suggested match or press Enter to open a list page with all matching results.

To open a suggested record:

- Click the record name to open it in view mode.
- Click **Edit** that appears on the right to open it in edit mode.
- Click **Dash** that appears on the right of a customer record to open the customer dashboard.

When you type keywords and press Enter, NetSuite compares them to record names and ID fields. It also checks Vendor Name/ID and UPC Code fields in item records. The default behavior is as follows:

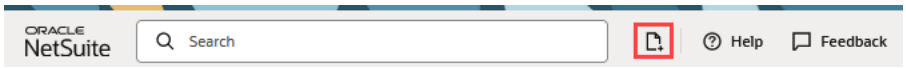
- When more than one record matches, you'll see a list of results.
- When only one record matches, the record opens in view mode.

Global search is a powerful tool, and this topic includes only basic information. To learn all the details, see the help topic Global Search.

NetSuite offers a variety of tools in addition to global search to help you find the information you need. This includes the ability to save your search for reuse. For information about all of the search tools NetSuite offers, see the help topic Search Overview.

Create New Menu

The Create New menu appears in the NetSuite header. The visibility of the menu depends on your role and permissions. For more information, contact you administrator.



This menu includes links to create new instances of different types of records. Each link in the menu represents a type of record related to the record or transaction you're currently viewing. Click a link to create a record of that type.

The options available on a record are limited by the role you're logged in with, but you can change which options are listed in the menu.

To add or remove links in the Create New menu:

1. Open the Create New menu and click **Personalize** to open the Set Up Create New Menu page.
2. Check the **Include** box next to the links you want to show on the Create New menu, and clear the **Include** box for the links you don't want to include.

   If the link you want isn't listed, you can create a shortcut instead. For instructions, see the help topic Shortcuts Portlet.
3. Click **Save**.

To reorder links in the Create New menu, drag a link up or down the list to change the order in which the links are listed. You also can select a link and use the Move to Top or Move to Bottom buttons. Click Save when you're done.

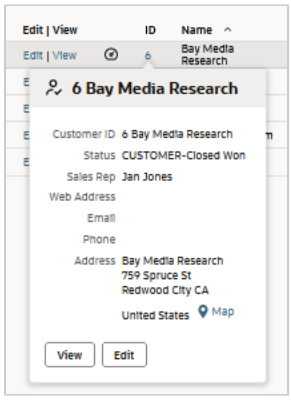
QuickViews

QuickViews let you quickly see the most important details of a record. Depending on the record type, the QuickView can also allow you to make changes to a record without having to open it.

Note: If you don't have permission to view a record or record type, you can't view it in QuickView.

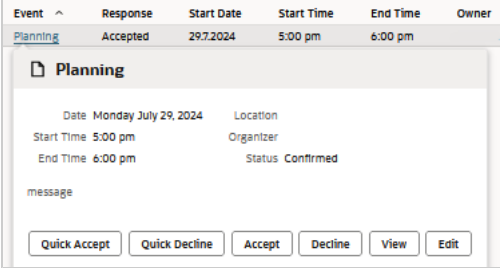
Viewing Record Details

Wherever a record is listed in a list, sublist, or on the main body of another record, you can hover your pointer over the link to get a QuickView of the record's key data. For example, hovering the pointer over a customer name in a sales order record opens a QuickView of the customer.



Taking Action on Records

The QuickView for some record types contains buttons that allow you to make changes to the record. In the following figure, for example, a QuickView of an event record in the Events list includes the Accept, Decline, and View buttons. To view the event record, click View.



Customizing QuickViews

The fields you see in a QuickView are set by default, but you can add, remove, or rearrange them by customizing the entry form. See the help topic Configuring QuickViews for the steps to configure QuickViews for custom forms and custom records.

> **Note:** Some item types in NetSuite contain images. To change the image in an item's QuickView, edit the image on the item record rather than on the form customization page where you configure QuickViews.

Keyboard Shortcuts

The following are useful keyboard shortcuts you can use in NetSuite.

> **Note:** Some keyboard shortcuts work differently depending on the browser you use. For more information, see Supported Browsers for NetSuite.

Searching Data in Your Account

You can press Alt+G to move the cursor directly to the Global Search field.

To search only the current page, press Alt+Shift+G. If you want to see results from both the global search and the current page search, press Esc. For more information, see the help topic Global Search Overview.

Entering Data and Completing Forms

Use these shortcuts to complete and edit data on forms and records:

- Press and hold Alt and Shift and type a letter to move to a subtab. See Navigating Subtabs.
- On a transaction line, press Enter to save the line and go to the next line.

- Press Tab to move the cursor between fields and buttons.
- Use the Spacebar to check or clear a box.
- In Amount fields, enter numbers to calculate by addition, subtraction, multiplication, and division. For example, enter 10 + 15 to calculate a total amount.
- Press and hold Ctrl and click with your mouse to select multiple choices in a list.

Date Fields

In date fields, press the following keyboard shortcuts to change dates:

Alt+T	Enter today's date
Alt+Shift+T	Enter tomorrow's date
Alt+Y	Enter yesterday's date
Alt+Left	Enter previous day
Alt+Shift+Left	Enter previous month
Alt+Right	Enter next day
Alt+Shift+Right	Enter next month
Alt+Home	Enter the first day of the selected month
Alt+End	Enter the last day of the selected month
Alt+Page Up	Enter next month
Alt+Page Down	Enter previous month
Alt+M	Enter the last day of the current month
Alt+L	Enter the last day of the previous month

Note: These keyboard shortcuts are supported only in full date fields that include the month, day, and year.

Multi-Choice buttons

On transactions and records that have buttons with popup lists, you can select the non-default button option. Use the Tab key to go to the list button. Then, use the down arrow key to expand the dropdown list. Click Enter to select the desired action. To collapse the list, use the up arrow key to return to the top.

Navigating Subtabs

When using tabbed pages, you can quickly switch between subtabs by using keyboard shortcuts. Each subtab has a single letter underlined in the title. Press and hold Alt and Shift (for MacOS, press and hold Option and Control) and then press the corresponding letter to switch to that subtab. The cursor appears in the first field on the subtab.

Viewing Reports

When viewing reports, you can do the following:

- Press **Page Up** to go to the previous page of a report.
- Press **Page Down** to go to the next page of a report.
- Press **Home** to go to the first page of a report.
- Press **End** to go to the last page of a report.

Filtering Search Results

When working with search results filters, you can use the following keyboard shortcuts:

- Use the Tab key to switch between filters.
- Use the Down Arrow key or the Up Arrow key to select an option from a filter dropdown list.
- When typing a value into a filter field, use the Tab key to apply the value.

  Please note that pressing Enter doesn't apply the filter value.

Popup and Dropdown Lists

When you're selecting from a long list of records in a NetSuite field, you can use built-in features like autocompletion and popup lists to save time. These functions include autocompletion and popup lists. Many fields also include links to search, edit, and create related records.

- Autocompleting Dropdown Lists
- Accessing Related Records from Dropdown Lists
- Using Popup Lists
- Using Popup List Search Links
- Popup Multi-Select Lists
- Using Popup Auto Suggest

Autocompleting Dropdown Lists

Instead of selecting from a dropdown list, you can type the first letters of a value and the field is completed automatically.

Accessing Related Records from Dropdown Lists

Some dropdown lists include buttons to access related records, so you can quickly add, review, or change a record before you select it for a field. These buttons appear when you hover over the dropdown list.

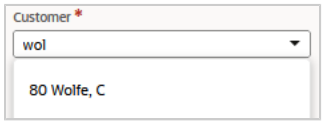
- Click the new + button to create a new record in a popup window.
- Click the open button to view or edit an existing record. The record opens in view mode in a new tab. Click **Edit** on the record to change to edit mode.

Using Popup Lists

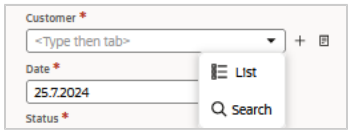
You can use the Maximum Entries in Dropdowns preference to force popup lists instead of dropdown lists for fields with large numbers of possible values. To set this preference, go to Home > Set Preferences. The Maximum Entries in Dropdowns field is on the General subtab. Enter the maximum number of records you want to appear in a dropdown list. If the possible values in a list exceeds this number, the list automatically becomes a popup list. If the possible values don't exceed this number, a dropdown list appears.

> **Tip:** Enter **0** in the **Maximum Entries in Dropdowns** field to always use popup lists. To always use dropdown lists, enter a large number that exceeds the number of entries in any of your lists.

Each popup list includes double arrows in place of the single arrow for a dropdown list. Start typing and press the Tab key to open a popup window that contains only records that begin with the letters you typed. For example, in the following screenshot, a user typed "wol" and pressed Tab to display a list of customers.



Alternatively, you can click the double arrows to display a popup and choose to open a list or search. The new and open buttons also appear when you click the arrows as shown in the following screenshot.



- Click the new button to open a popup window and add a new record.
- Click the open button to open the selected record in view mode in a new tab. Click **Edit** on the record to change to edit mode.

To clear a value that you've previously entered in the list, select the value and press the Delete key.

Using Popup List Search Links

Most fields with a popup list also have a search link. Click the **Search** icon, and a search window pops up. Enter criteria for the search, click Submit, and you'll see a list of items matching your search criteria. Select the item you want, and it'll be added into the field.

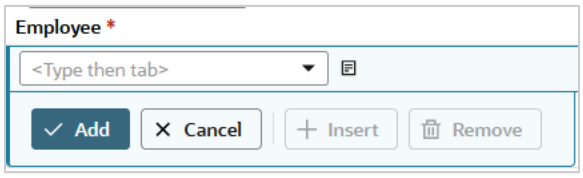
> For example, to create a sales order for a customer in Alaska, click **Search** next to the Customer:Project field. When the Customer Search window pops up, type AK in the state field, and click Submit. The pop up window changes to show only your customers in Alaska. Click the name of the customer you want, and NetSuite inserts it into the Customer:Project field.

On transaction forms, NetSuite searches the full name of the item or the name of the final subitem and autofills the item field with any matching names. For example, if you type **bas** you'll find Summer:Picnic:Basket and Basket:Welcome.

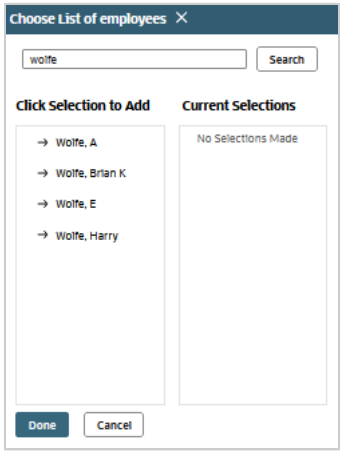
Note: After you inactivate a record, it won't show on transactions for selection in popup or dropdown lists. However, if the Search option appears in the popup or dropdown for a field, the search will return inactive records if the Inactive filter is set to Either or Yes. Inactive records in these search results can be added to transactions. To filter inactive records out of search results, be sure to set the Inactive filter to No in the search criteria.

Popup Multi-Select Lists

On fields that allow you to select multiple values, you can access popup multi-select lists. To quickly enter a single value in this type of field, type the first few letters and press Tab. To enter multiple values, click the double arrow button to display a popup with a complete list of records that you can select and search.



To search for records, enter the first letters of the record name and click **Search**. To add fields to your selection, click the record name in the left column. The item moves to the Current Selections column on the right.



When you've selected all required records, click **Done**.

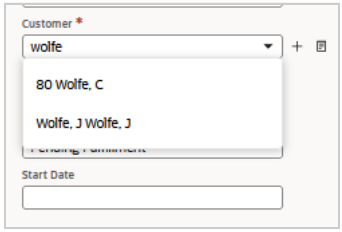
Note: To change or remove values in a multi-select list, don't edit the list directly. Click the double arrow button to open the popup and make the required changes.

To remove a value from a multi-select list, click the double arrow button beside the field.

Click the X button next to the selection that you want to remove, and then click **Done**.

Using Popup Auto Suggest

NetSuite provides an auto suggest function for popup lists. As you type three letters or more, a list of suggested matching records appears. You can select from this list to quickly populate the field.

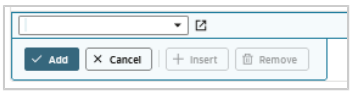
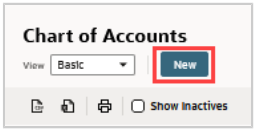
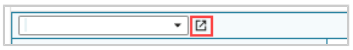


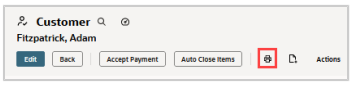
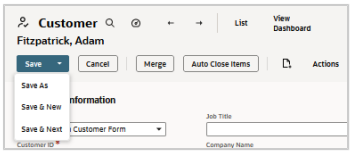
If you don't want to see suggested matches, you can disable the auto suggest feature by clearing the Popup Auto Suggest box on the Analytics subtab of Home > Set Preferences.

Buttons and Menus in NetSuite

Each button in NetSuite serves a specific purpose and has the ability to fulfill individual business needs. By using the appropriate button, you can successfully complete the task at hand. The following table explains

what the standard buttons do and where to find them on most NetSuite pages. The table doesn't include buttons that are specific to a particular feature or record type.

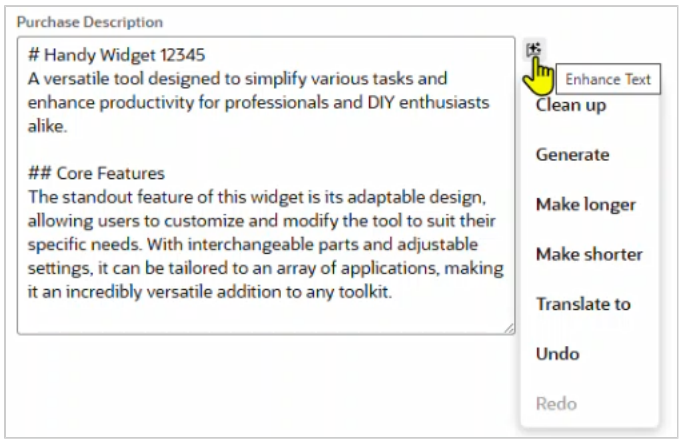
Button Description	Example
Sublist Row Buttons Sublist row buttons such as Add, Insert, and Delete appear on the left side of the sublist. The buttons that are available and the button names change depending on where you are in NetSuite.	
Back Button The Back button appears when a record is in View mode. Clicking the Back button takes you back to the page where you first initiated a particular action.	
Cancel Button The Cancel button appears below the record title when a record is in either new or edit mode. Clicking the button cancels whatever action you were performing.	
Create New Button The Create New button is an icon with a dropdown menu. You can create new records or perform new tasks. The options on the Create New button vary on a per-record basis, as the options are specific to each record type. To create records unrelated to the current record, use the Create New menu in the NetSuite header. For more information see, Create New Menu.	
Action Menu The Action menu offers a dropdown menu. The dropdown menu may include various options, such as Download and Delete. These options depend on the record you're editing.	
Edit Button The Edit button opens the current record or transaction in a format that you can make changes to. When you're finished, submit changes by clicking Save.	
Mark All/Unmark All Buttons Mark All checks every box on the page where the button appears. Unmark All clears the checks.	
New Button On records in edit mode, the New button is a plus sign icon that appears to the right of a field when the pointer moves over it. The button opens a window in which you can create a new record. Most lists also have a New button. For example, the New button at the top of the Employees list is called New Employee.	 
Open Button On records in edit mode, the open button is a square icon with a diagonal arrow that appears to the right of a field when the pointer moves over it. The button opens the selected record in a new tab for viewing.	

Button Description	Example
Print Button If multiple printing options are available, the print icon includes all options in the dropdown menu. If the record allows only a single print action (to print the page, for example), the print icon doesn't include the dropdown arrow.	
Save Button The Save button sends the transaction or record you're working on to NetSuite for posting or changing. The Save button often includes a dropdown menu for variations of save as shown in the example. NetSuite remembers the option selected and makes it the default. **Save As Button** The Save As button makes a copy of the current record, but you'll need to give it a unique name. For example, a customer may have multiple locations, Art Gallery I and Art Gallery II. The home office in Gallery I is the main office for both locations. You can create a record for Gallery II by editing the Gallery I record, changing the name to Art Gallery II and clicking Save As. **Save and New Button** The Save and New button sends the transaction or record to NetSuite for posting, and then a blank page of the same kind opens. **Save and Next Button** The Save and Next button sends the transaction or record to NetSuite for posting, and then the next existing record of the same type opens for editing. **Save and Edit Button** The Save and Edit button saves your edits and remains in edit mode where you can continue editing.	
Enhance Text Button The Enhance Text button appears next to fields where the Text Enhance generative AI feature is available. Click the button to display a dropdown menu of the available actions. For more information, see Text Enhance.	

Text Enhance

Text Enhance uses generative AI to assist you with writing business content in NetSuite. It can help you create and refine content, and make sure it's the right length for your needs. Text Enhance can also help you translate your content into other languages.

Text Enhance uses information from the page you are editing when it generates content. For example, when you use Text Enhance to generate a sales description for an inventory item, it uses information such as the item name, vendor description, display name, and stock description from the inventory item page. Text Enhance can also help you write different item descriptions for the same item, depending on how you will use the descriptions. For example, if you use Text Enhance to generate text for the Purchase Description field, it can include different details and even a different tone than what Text Enhance generates for the Sales Description field.



Tip: You can take the free *AI in NetSuite* learning path. It covers artificial intelligence (AI) in NetSuite, how to use Text Enhance, and more. To access the learning path and more AI training, go to the NetSuite MyLearn home page and search for **AI**.

Using Text Enhance

Text Enhance actions are available for the entire field when you click the **Enhance Text** button. You can also apply supported Text Enhance actions to content you've selected in fields where Text Enhance is available. For example, if you're working on an email message and only want to revise part of it, select the part you want to change and a menu displays the available actions.

Note: Text Enhance is:

- Enabled by default, but can be disabled by users with an Administrator role. See the help topics Manage Text Enhance Preferences and Manage Text Enhance Translations Preferences for more information.
- Available for accounts in supported locations and for users whose language preference is set to a supported language. See the help topic Generative AI Availability in NetSuite for more information.
- Available for assisting with content in all system-supported languages. For more information, see Choosing a Language for Your NetSuite User Interface.
- Available by default to NetSuite users with an internal role and access to a page where Text Enhance is available. NetSuite users with an Administrator role can enable it for external roles if needed. See the help topics Manage Text Enhance Preferences and Manage Text Enhance Translations Preferences for more information.

To Use Text Enhance:

1. On the page where Text Enhance is supported, complete the required fields. You can also add extra details you'd like Text Enhance to use into the field with Text Enhance.

2. The field with Text Enhance displays the **Enhance Text** button. Click the button to display the available actions.
3. Select an action. Available actions may include one or more of the following:
   - **Generate**: Using information that you've already entered, Text Enhance generates text appropriate for the field.
   - **Clean Up**: Text Enhance refines the existing text. This option corrects grammar and spelling errors, and it may also rephrase some text to use effective style and tone. Only available when there's text in the field.
   - **Make Shorter**: Text Enhance shortens the text. Only available when there are more than 200 characters (about three sentences) in the field.
   - **Make Longer**: Text Enhance takes the text entered in the field and expands it into well-written business prose. Only available when there's sufficient space in the field (less than half the character limit).
   - **Translate to**: Select a language, and Text Enhance translates the text in the field into the language you selected.
   - **Undo**: Reverts the last Enhance Text action and changes the content to the field's previous content. To go back to an earlier result, select Undo again, until you get back to the result you want. Text Enhance keeps its previous results while you're working on a page.
   - **Redo**: Restores the last Enhance Text action and changes the field's content to what it was before you selected Undo.

   > **Note:** On first use, Text Enhance displays a confirmation message to inform you that you're using an artificial intelligence (AI) feature. The message is as follows: "Text Enhance is an AI feature that generates content for your use. Your data may be processed globally according to the Oracle Services Privacy Policy." Click the link if you want to view the policy. It'll open in a new web browser tab or window. Click **OK** to close the message and continue the Text Enhance action that you selected.

   To complete an action, Text Enhance uses data from the required and optional fields that you've already completed. The system shows the new or updated content in the field when it's done.
4. Review the content carefully and refine it as desired. Optionally, you can click Enhance Text again and select another action. You can also make your own changes and override any text from Text Enhance.

   > **Important:** **Always read the Enhance Text content carefully before you save your changes to the page.** Generative AI services, such as Text Enhance, use creativity in their responses. A person should always validate the generated content for accuracy and quality.
5. When you're done, click **Save**.

To Use Partial Text Enhance:

1. Add content to a field that has Text Enhance. Fields with Text Enhance display the **Enhance Text** button next to the field.
2. Select the text you'd like to change.

   The partial Text Enhance menu is displayed. **Clean Up** and **Translate to** are available by default, but you may see other actions if they're set up for your NetSuite account.
3. Select an action from the partial Text Enhance menu.
   - If you select **Clean Up**, Text Enhance refines the selected text. It fixes grammar and spelling mistakes, and it may also rephrase some text to improve style and tone.

- If you select **Translate to**, Text Enhance shows a list of languages. Select a language, and the text you selected is translated into that language.

4. Review the content carefully and refine it as desired. If you want to undo the partial action, click the **Enhance Text** button and select **Undo**. You can also make your own changes and override any text from Text Enhance.

> **Important: Always read the Enhance Text content carefully before you save your changes to the page.** Generative AI services, such as Text Enhance, use creativity in their responses. A person should always validate the generated content for accuracy and quality.

5. When you're done, click **Save**.

Tips and Troubleshooting

When enhancing text, keep in mind the following:

- If you want to start over or remove the text, you need to clear the field. You can go back to the original content by using Undo or by canceling out of the page.
- If you select another action from the Enhance Text menu, the text in the field will be replaced completely. Use Undo or Redo to switch between previous versions of the content.

The following table lists potential Text Enhance issues and their associated solutions:

Issue	Solution
You don't see the **Enhance Text** button next to any text area fields, even after you type text into the fields.	Your NetSuite account location and your company's Text Enhance preferences affect whether Text Enhance is available for you. See the note at the start of the Using Text Enhance section for more information.
You selected text in a field with Text Enhance, but the menu with partial actions wasn't shown.	Partial Text Enhance actions for the field may be affected by changes made in Prompt Studio. A NetSuite user with an Administrator role can verify that.
You don't see **Generate** on the Enhance Text menu.	By default, Generate is only available for certain fields in NetSuite.
You can't select **Generate** from the Enhance Text menu.	Generate is available only when you've filled out all the required fields. Complete those fields and try again.
You can't select **Clean Up** from the Enhance Text menu.	Clean Up is available only when there's text in the field. Add some text and try again.
You can't select **Make Longer** from the Enhance Text menu.	Make Longer is available only when there's enough space in the field (less than half the character limit). Remove some of the text and try again.
You can't select **Make Shorter** from the Enhance Text menu.	Make Shorter is available only when there are more than 200 characters (about three sentences) in the field. Add more text and try again.
You don’t see **Translate to** on the Enhance Text menu.	Text Enhance Translation may have been disabled for your account. A NetSuite user with an Administrator role can verify that.
You can’t select **Translate to** from the Enhance Text menu.	**Translate to** is available only when there's text in the field. Add text to the field and try again.

Issue	Solution
You don't see a language you need on the **Translate to** list.	A NetSuite user with an Administrator role can change this list for your company's account. For more information, see the help topic Enable or Disable Translation Languages.
You can't select **Undo** from the Enhance Text menu.	Undo is available only after you've used Generate, Clean Up, Make Longer, or Make Shorter.
You can't select **Redo** from the Enhance Text menu.	Redo is available only after you've used Undo.
When you click the Enhance Text button, you see the message, "Sorry, text enhancing is currently not available. Please check your internet connection and try again. If the issue persists, contact NetSuite Customer Support."	This error may happen if you have an internet connection issue. It may also occur if there's a problem with NetSuite or the generative AI service. If this keeps happening, contact NetSuite Customer Support. For more information, see NetSuite Support.
When you click the Enhance Text button, you see the message, "Enter the following fields before enhancing text:" and a list of fields.	The required fields for Text Enhance are a subset of page's required fields. Complete the required fields and try again.
When you click the Enhance Text button, you see the message, "The last request is still in process. Please wait for it to finish. "	You may see this if you try another action while Text Enhance is still working. Wait for the field to update, and then try the action again if needed.
When you click the Enhance Text button, you see the message, "Response has timed out. Please try again."	You may see this if the generative AI service doesn't respond to NetSuite in time. Try the action again. If this keeps happening, contact NetSuite Customer Support. For more information, see NetSuite Support.
When you click the Enhance Text button, you see the message, "Text Enhance is at capacity. Please wait and try again."	You may see this when NetSuite is handling many Enhance Text actions at the same time. Try again later.
When you click the Enhance Text button, you see the message, "Monthly quota of Text Enhance requests has been met."	Your account reached its monthly usage limit, so Text Enhance won't be available until next month. Users with an Administrator role can verify usage. For more information, see the help topic View Text Enhance Usage Limit and Usage.

Logging in to NetSuite

Watch the following video to learn how to log in and out of NetSuite.

Logging In and Out of NetSuite

Authentication is the process of verifying your identity when you log in to an application. This section explains how your identity can be authenticated when you log in to NetSuite.

The most common way to log in to the NetSuite UI is using your email address and password, which are your user credentials. Depending on the role or roles you're assigned by your account administrator, you might also be required to provide a second factor for authentication, known as two-factor authentication, or 2FA.

See the following sections for more information about how your identity is authenticated when you log in to NetSuite.

- Logging in to the NetSuite UI

  This section contains the following topics:

  - Supported Browsers for NetSuite
  - Your User Credentials
  - Finding Your Settings Portlet
  - Change Email Link
  - Change Password Link
  - Setting Up Security Questions
  - Update Security Questions Link
  - If You Forget the Answers to Your Security Questions
  - Getting Access When You Forget Your Password
  - My Login Audit Portlet
- Logging In Using Two-Factor Authentication (2FA)

  This section contains the following topics:

  - Set up Your Preferences for Two-Factor Authentication (2FA)
    - Complete Your 2FA Setup
    - Supported Authenticator Apps
    - Troubleshoot Authenticator Apps
  - Using 2FA
    - The Logging in Page for 2FA
    - Managing Your Trusted Devices
    - Reset Your 2FA Settings
    - Backup Codes for Two-Factor Authentication (2FA)

Logging in to the NetSuite UI

This section explains the simplest way to log in to the NetSuite UI using your email and password, which are your user credentials. In this section, you'll also find steps for locating the Settings portlet, which includes links to change your email address, changing your password, updating your security questions, and other tasks. You can also find information about creating strong passwords, answering security questions, and what to do if you forget your password.

See the following topics for more information:

- Supported Browsers for NetSuite
- Your User Credentials
- Finding Your Settings Portlet
- Change Email Link
- Change Password Link
- Setting Up Security Questions
- Update Security Questions Link
- If You Forget the Answers to Your Security Questions
- Getting Access When You Forget Your Password
- My Login Audit Portlet

Supported Browsers for NetSuite

Important: This topic covers browser support only for the NetSuite application, which is different from the browser support for Commerce websites. For more information, see the help topic Supported Browsers for Commerce Websites.

Browsers by Platform

NetSuite is supported in the following browsers and operating systems:

Browser	Versions	Platform
Google Chrome	Two most recent stable major versions.	Windows 10 or newer Mac OS 10.15 or newer
Microsoft Edge (Chromium-based)	Two most recent stable major versions.	Windows 10 or newer
Mozilla Firefox	Two most recent stable major version. The latest stable Extended Support Release (ESR).	Windows 10 or newer Mac OS 10.15 or newer
Safari[1]	Two most recent stable major versions.	Two most recent stable major versions.

[1] Your cookies settings may affect the ability to use this browser when accessing SuiteAnswers. If you run into any issues, open your Safari browser, go to Safari > Preferences > Privacy and turn off the Prevent cross-site tracking option. Then close Safari, reopen it, and access SuiteAnswers through NetSuite.

Important: Some third-party plugins and extensions in your browser can cause problems with the NetSuite interface.

Note: Some ad blockers can stop you from creating pivot tables or charts in SuiteAnalytics Workbook, no matter which browser you use. To avoid errors with SuiteAnalytics Workbook, turn off these plug-ins. For more information about SuiteAnalytics Workbook, see the help topic SuiteAnalytics Workbook Overview.

Touch Screen Device Support

Most user interface actions are supported on touch screen devices, but you might run into minor issues.

Mobile Devices

There's a NetSuite app for mobile devices. For information about system requirements for mobile devices, see the help topic System Requirements.

Your User Credentials

The combination of your email address and your password are your user credentials for accessing NetSuite. Your email address is considered, and often referred to, as your username in NetSuite.

If you have access to NetSuite accounts for more than one company, you can use the same username for all of them or a different one for each company.

- If you use the same user credentials for all companies, all of your roles in all companies are listed on the My Roles page and the Change Roles list. Hover over the upper right corner to display the Change Roles list. The list displays your roles in the current account. You can select a different role from the list, or select **View My Roles** to open the My Roles page. Click the name of the role you want to switch to. If the required role is in a different account, you must first switch to that account from the My Roles page.
- If you use separate user credentials for different companies, you must log out and then log in again to switch companies.

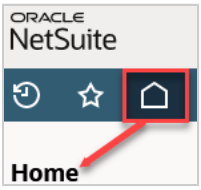
Important: You're uniquely identified in NetSuite by your email address, which serves as your username. There's a one-to-one relationship between username and password. That means one username can have only one password, no matter how many accounts or companies you access with it.

Finding Your Settings Portlet

Use the links in the **Settings** portlet on your Home page to change your password and to perform other setup and configuration tasks in NetSuite.

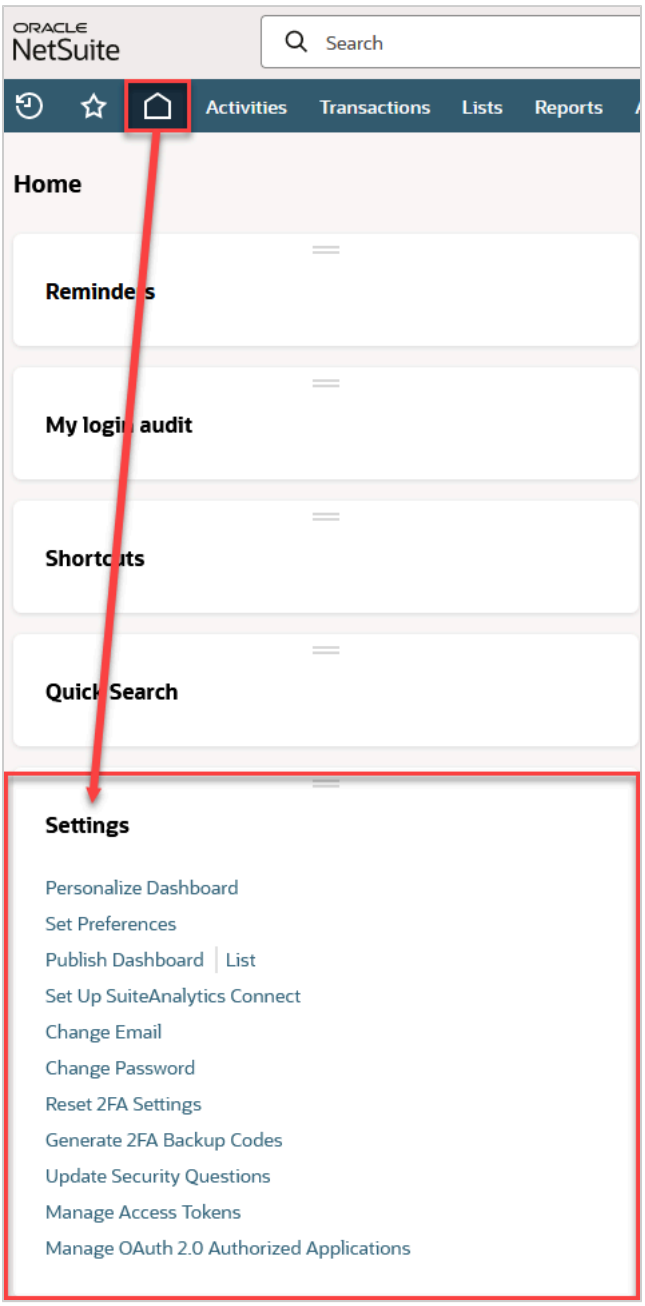
To find your Settings portlet:

1. Click to verify that you're on the Home page, also called the dashboard.



   Important: The Settings links you're looking for aren't in the list that appears when you hover over the Home icon.

2. The **Settings** portlet can appear anywhere on a customized Home page. By default, the **Settings** portlet is located on the left side of the page. You might need to scroll down to see it.



3. Click the appropriate link for the task you need to complete.

   For more information about these links, see the following topics:

   - Change Email Link
   - Change Password Link
   - Active Sessions
   - Reset Your 2FA Settings
   - Backup Codes for Two-Factor Authentication (2FA)
   - Update Security Questions Link

Note: If you can't find your Settings portlet, contact your account administrator.

Change Email Link

The email address you use to log in to NetSuite is also used for email notifications and other communications from administrators. You can use the Change Email link in the **Settings** portlet to change your email address.

Important: Before you change your email address in NetSuite, verify that this change is OK with your account administrator.

To change your email address:

1. Find the **Settings** portlet on the Home page. If you can't locate the **Settings** portlet, see Finding Your Settings Portlet.

   Tip: The **Settings** portlet can appear anywhere on a customized Home page (or dashboard). By default, it's located on the left side, and you might need to scroll down to see it.

2. Click **Change Email**.
3. In the **Current Password** field, enter the password you currently use to log in.

   You must provide your password when you're changing your email address, to ensure the security of your account.

4. Enter the new email address in the **New Email Address** field, then enter it again in the **Confirm New Email** field.
5. Check the **Just This Account** box to change your login information for only the account to which you're currently logged in. This option only applies if you have access to multiple NetSuite accounts.

   If you clear this box, you can log in to all of your NetSuite accounts with the updated email address.

6. Click **Save**.

After you have saved the change to your email address:

- A notification message is sent to your current email address.
- A validation message is sent to your new email address with a link that you must click to complete the change.
- You must continue to use the current email address to log in to NetSuite until you confirm the change by clicking the validation link.
- The new email address is listed in the **Pending Email Change** field on the Change Email page until you click the validation link or the link expires.

The times in the notification and validation messages are based on the time zone preference that you've set at Home > Set Preferences.

Important: If you receive a notification about an email change you didn't make, alert your account administrator about a possible security issue. If you receive a notification message and you realize that the change is in error, for example you made a typo in the new email address, you can let the validation link expire. Then you can enter the correct email address.

Change Password Link

You can change your password using the **Change Password** link in the **Settings** portlet when you're logged in to NetSuite. First, you must enter the password you used to log in to your account, and then enter a new password. You must provide your password to ensure the security of your account.

Important: If you don't see the **Change Password** link in your **Settings** portlet check the role you're currently logged in with. It's possible that the role doesn't have the permission needed to change the password. Try switching to another role or contact your Administrator.

How to Change Your Password

You can also reset your password if you're unable to log in because you forgot your password. For more information, see Getting Access When You Forget Your Password.

To change your password:

1. Find the **Settings** portlet on the Home page. If you can't locate the **Settings** portlet, see Finding Your Settings Portlet.

   Tip: The **Settings** portlet can appear anywhere on a customized Home page (or dashboard). By default, it's located on the left side, and you might need to scroll down to see it.

2. Click **Change Password**.
3. In the **Current Password** field, enter the password you currently use to log in to NetSuite.

   If you provide five consecutive wrong passwords, you're locked out of NetSuite for a period of 30 minutes.

   Note: If you can't remember your current password, see Getting Access When You Forget Your Password.

4. In the **New Password** field, enter a new password.
5. As you type, the **Password Criteria** fields provide feedback, ensuring that the password you enter meets the required criteria. For more information, see Creating a Strong Password.
6. Re-enter the new password in the **Confirm New Password** field.
7. Click **Save**.

   The next time you log in to NetSuite, you must use the new password.

   Note: You'll receive an email notification when the password associated with your email address is changed. This email notification helps you to be more aware and proactive in cases where there's a fraudulent attempt to change your password.

Creating a Strong Password

It's important to choose a password that can't be compromised. Your password is validated to ensure it meets minimum requirements. The validation is based on a combination of password settings that can be modified by your account administrator and system requirements that can't be modified.

Note: For information about how to change your password, see Change Password Link.

By default, all NetSuite accounts are set to have a Strong password policy. This policy enforces the following requirements:

- Minimum length of 10 characters
- At least 3 of the following 4 character types—uppercase letters, lowercase letters, numbers, non-alphanumeric ASCII characters
- No non-ASCII characters, which are considered illegal
- Not something that someone could easily guess, such as common names, words, and strings like abcd123456
- Significantly different from your most recent password
- The password can't be in a list of leaked passwords. NetSuite checks the password on submit, which can cause the password being rejected even if all other criteria are met. If that happens, you should consider changing the leaked passwords in other services you use.

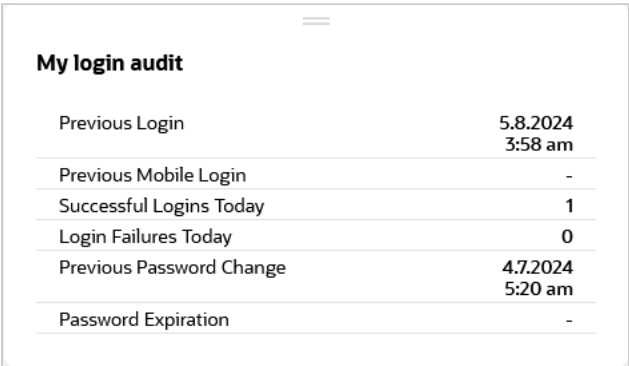
The length and character type requirements for your password may vary if your account administrator has changed the password policy or minimum password length. Ask your administrator if you have questions about the password requirements for your company.

The **Password Criteria** fields provide immediate feedback as you type a password on the Change Password page. This feedback shows you whether your entered password complies with all of the password requirements for your company.

The **Password Criteria** fields appear on any entity record where it's possible for you or an administrator to enter a password for granting access to your NetSuite account.

Password Expiration Notifications

Your NetSuite password will expire. The length of time that a password remains valid depends on the password requirements configured by your account administrator. You can view the date and time your password will expire in the **My Login Audit** portlet on your Home page.



My login audit

Previous Login	5.8.2024 3:58 am
Previous Mobile Login	-
Successful Logins Today	1
Login Failures Today	0
Previous Password Change	4.7.2024 5:20 am
Password Expiration	-

Tip: After changing your password, refresh the portlet to see the new password expiry date.

You'll receive advance notice of the date that your password will expire. This notice helps to eliminate uncertainty and problems associated with having to change your password at an inconvenient time. The first notice is sent 14 days before your password expires. As soon as you update your password, the notices stop. If you don't change your password, the next notice arrives seven days before your password expires. If necessary, you'll receive an additional notice each day for the final three days before your password expires.

The password expiration notification includes a link to let you change your password. A table lists the Company ID, Company Name, Days to expiration, and account type to help you identify the role and the account where your password is expiring.

You can also use the **Change Password** link in the **Settings** portlet to change your password. For more information, see:

- Change Password Link
- Finding Your Settings Portlet

Be aware of the following:

- Users can have roles that provide access to more than one NetSuite account. It's possible that some of the accounts to which a user has access have a stricter password requirements than other accounts. On rare occasions, users may attempt to access a role in an account that has stricter password requirements and encounter a password expired error message. For example, users assigned to the NetSuite 360 or the NetSuite 360 - Plus Financials role are accessing the Oracle NetSuite account through the **NetSuite 360** portlet. These users are then subject to the Oracle NetSuite password requirements. In this case, users must change their password before they can access NetSuite 360.
- You might be required to comply with Payment Card Industry Data Security Standard (PCI DSS) password requirements. If you have a role with the View Unencrypted Credit Cards permission, you must change your NetSuite password at least every ninety (90) days. If your company policy for NetSuite password expiration is greater than 90 days, the 90 days limit is automatically enforced for anyone with the View Unencrypted Credit Cards permission. In addition, the required length for a password is a minimum of 12 characters. Everyone with access to unencrypted credit card numbers must comply with PCI password requirements.
- Roles to which the SAML Single Sign-on permission has been added, and roles that have been designated as Single Sign-on Only, are exempt from password expiration notifications. SAML user credentials aren't managed by NetSuite, but by the Identity Provider (IdP).

  Note: Users with multiple roles will receive the password expiration notification if one or more roles aren't designated as Single Sign-on Only. This also applies to roles deactivated on the Role page.

Leaked Passwords Check

As of NetSuite 25.2, the leaked passwords check was enhanced to cover more cases and provide more security for all NetSuite accounts. See the following for information about the leaked passwords check:

- NetSuite checks all passwords against a list of passwords that are leaked and potentially compromised.

  Previously, NetSuite only checked the password during their creation. As of NetSuite 25.2, passwords are checked during login, too.
- When you change your password, NetSuite doesn't allow you to choose a password that is in the list of compromised passwords. The check is triggered when you attempt to submit the password. This applies even if the password meets all the other security criteria.

  - If you use the same password elsewhere, it's best practice to change it to prevent potential breach.
  - Set up a unique password that you don't, or haven't previously used elsewhere.
- **Important:** If you see an error message in NetSuite saying that your password is in the list of compromised passwords, it doesn't mean that your account was breached.

  The leaked passwords check only informs you that the password you're using to log in to NetSuite is known to potential attackers. It is possible that you're using the same password to log in to other services that were recently attacked, and the password was compromised that way.
- NetSuite updates the leaked passwords database regularly to include newly compromised passwords.

Note: The system also checks web store customer passwords during their creation but not during login. For more information, see the help topic Password Requirements for Customers.

Active Sessions

You can manage your active sessions using the **Active Sessions** link in the **Settings** portlet when you're logged in to NetSuite.

To manage your active sessions:

1. Find the **Settings** portlet on the Home page. If you can't locate the **Settings** portlet, see Finding Your Settings Portlet.

   Tip: The **Settings** portlet can appear anywhere on a customized Home page (or dashboard). By default, it's located on the left side, and you might need to scroll down to see it.
2. Click **Active Sessions**.
3. On the Active Sessions page, you can click the **Invalidate other sessions** button, which logs you out of all active sessions, except the current one you're working with.

   You can see how many active sessions you currently have, maximum is three.

   Important: If you're unsure about your active sessions, you should always invalidate them to prevent your account from misuse.

Setting Up Security Questions

The first time you log in to NetSuite, you're prompted to answer three security questions. These answers are used to verify your identity if you forget your password or if you log in from a new browser or a new computer. This process helps to maintain application security by preventing unauthorized use of your NetSuite user credentials.

If you're under time pressure, you can click **Remind Me Later** to dismiss this prompt and log in to NetSuite immediately. However, the next time you log in to NetSuite, you'll be prompted again to set up these questions.

Note: You can dismiss this prompt up to five times. After that, you'll be required to set up security questions to proceed with your login to NetSuite.

See the following sections for more information:

- Set Up Security Questions Link
- Security Questions Details

Set Up Security Questions Link

If you dismiss the prompt, then decide you would like to set up your security questions, click the **Update Security Questions** link in the **Settings** portlet.

Tip: The **Settings** portlet can appear anywhere on a customized Home page (or dashboard). By default, it's located on the left side, and you might need to scroll down to see it.

If you can't locate the **Settings** portlet, see Finding Your Settings Portlet. See also Update Security Questions Link for more information.

Important: Remember your questions and answers! NetSuite doesn't often prompt you to answer a security question, you forget you set them up. However, there're several situations when you'll be prompted, and it's important that you know the answers. See When Security Questions are Asked for more information.

When you save your security questions and answers, a confirmation is displayed. Also, an email is sent to the email address you used to log in, as notification that this setup has occurred.

You have the option of changing your security questions and answers later. See Update Security Questions Link.

Security questions and answers are shared across all NetSuite accounts associated with the same production account.

Security Questions Details

See the following sections for details about security questions:

- Requirements for Answers to Security Questions
- Exemptions from Setting Up Security Questions
- When Security Questions are Asked

Requirements for Answers to Security Questions

If any of these requirements isn't met, you'll receive an error when you attempt to save security answers.

- You must answer all three questions.
- Each answer must be unique.
- Each answer must be at least three characters long.
- You can't use your email address or password as an answer.

Note: Answers aren't case-sensitive.

Exemptions from Setting Up Security Questions

If you log in to NetSuite with certain roles, or with certain types of access, you're exempted from the requirement to set up security questions. The following roles are exempted:

- Customer Center
- Web Store Shopper

Note: Users with two-factor authentication (2FA) roles, or roles with IP address restrictions enabled are prompted to set up security questions. However, users with 2FA or IP address restricted roles are only asked to answer security questions if they forget their passwords.

The following types of access are exempted:

- Web Services
- SuiteScript
- SuiteAnalytics Connect
- OpenID Connect (OIDC) Single Sign-on
- SAML Single Sign-on

When Security Questions are Asked

You'll be prompted to answer a security question before you can log in to NetSuite in the following circumstances:

- When you attempt to log in:
  - using a new browser
  - after the browser cache has been cleared
  - with the browser set to private mode (also called incognito browsing)
  - from a new or different computer

  Note: This additional authentication requirement doesn't apply to you if you're using two-factor authentication roles, or roles with IP address or device ID restrictions enabled.
- When you forget your NetSuite password, and must reset it.
- If it has been more than 90 days since your last login.

If you answer the security question correctly, your log in to NetSuite proceeds and an email is sent to the email address you used to log in, as notification of the successful authentication.

If you provide five consecutive wrong answers to the security question, you're locked out of NetSuite for a period of 30 minutes, and an email is sent to your email address and to your account administrator, as notification of the authentication failure.

Update Security Questions Link

The first time you log in to NetSuite, you're prompted to set up three security questions that are used to verify your identity, as described in Setting Up Security Questions. You have the option of changing these questions and answers.

You're the only one who can update your security questions. If you can't answer your security questions, see If You Forget the Answers to Your Security Questions.

To change security questions and answers:

1. Find the **Settings** portlet on the Home page. If you can't locate the **Settings** portlet, see Finding Your Settings Portlet.

   Tip: The **Settings** portlet can appear anywhere on a customized Home page (or dashboard). By default, it's located on the left side, and you might need to scroll down to see it.
2. Click **Update Security Questions**.

3. Enter your current NetSuite password.
4. In the **Question 1**, **Question 2** and **Question 3** fields, select questions for which you can remember the answers.
5. In the **Answer 1**, **Answer 2**, and **Answer 3** fields, enter the answers to each question you selected. You must answer all three questions.
   - Each answer must be unique.
   - Each answer must be at least three characters long.
   - You can't use your email address or password as an answer.
   - Answers aren't case-sensitive.
   - Answers are masked (hidden) by default. Clear the **Hide Answers** box to see the characters without the mask.
6. Click **Save**.

If You Forget the Answers to Your Security Questions

Since you aren't often prompted to respond to the security questions you set up, you may occasionally forget your questions or the answers you provided. The easiest way to handle this is when you're logged in to NetSuite. Click the **Update Security Questions** link in the **Settings** portlet. Select new questions, or provide answers to your existing questions. See Update Security Questions Link for details.

If you're attempting to log in to NetSuite and are prompted to answer a security question but can't remember the answer you gave, you might be required to reset your password or ask your account administrator to do so.

If an account administrator resets your password, your previously saved security questions are erased and you must set up these questions and answers again. If you reset your own password, the existing security questions and answers are maintained.

Remember your answers! You won't often be prompted to answer a security question, so you may forget that you set them up. If you do forget your answers, the following suggestions should help.

To deal with forgotten security questions:

1. You have five attempts when answering security questions during login. You have 20 attempts when answering security questions during password reset. Try the most likely answers you would have given.
2. If the first attempt doesn't succeed, try again. Keep trying the most logical answers to your security questions.

   Tip: Case doesn't matter, so don't waste an attempt by changing some characters to a different case.
3. If you can't reset your own password, and can't remember your answers to security questions:
   a. Update your security questions when you're already logged in to NetSuite.
   b. Ask your account administrator to reset your password. If your account administrator resets your password, your existing security questions and answers are erased. After your password is reset, you must set up new security questions and answers. If you or your account administrator can't reset your password, your account administrator can contact Support for assistance.
   c. Ask your account administrator to designate your role as a two-factor authentication (2FA) required role. Roles that are designated as requiring 2FA are never asked security questions. For more information, see Logging In Using Two-Factor Authentication (2FA).

Getting Access When You Forget Your Password

If you need to change your password, use the **Change Password** link in the **Settings** portlet. For more information, see Change Password Link. See also Finding Your Settings Portlet.

However, if you can't remember your password, you can try to reset your password yourself. Go to the NetSuite login page and click the **Forgot Your Password?** link. See the following procedure, The Forgot Your Password Reset, for complete instructions.

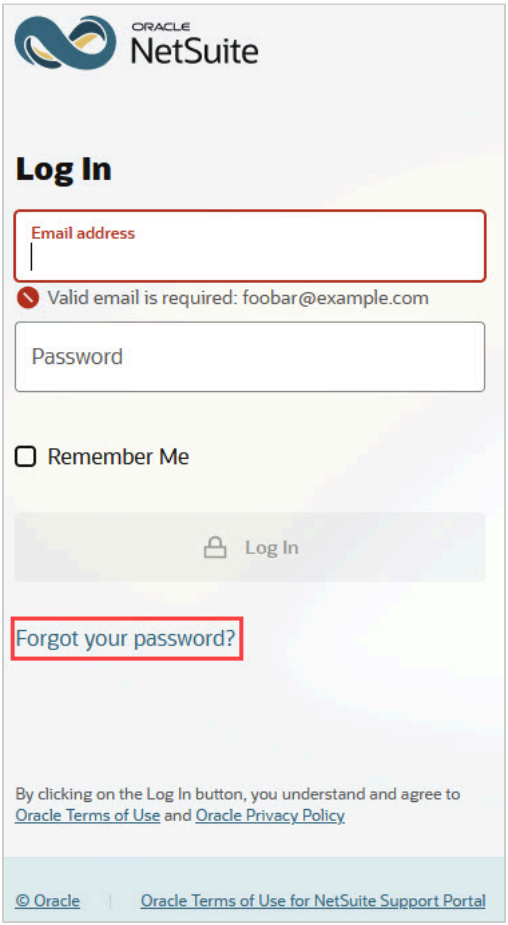
The Forgot Your Password Reset

Use the following procedure when you can't remember your password. Part of the password reset process includes answering security questions to verify your identity.

Important: If you didn't set up security questions or don't remember the answers to them, you may need assistance to access your account. If this is the case, contact your NetSuite account administrator to reset your password. When your Administrator resets your password, you must set up new security questions and answers.

To reset your password:

1. On the NetSuite login page, enter the email address you use to log in to NetSuite.



2. Click **Forgot Your Password**.

3. On the Reset Password page, enter the email address you use to log in to NetSuite, and click **Continue**.

   Follow the instructions displayed on the screen.
4. Check your email client for an email message with directions and a link for resetting your password.

   Note: The link will expire in 60 minutes.

   a. If you don't receive an email message, verify whether the email address you entered in the previous step is correct. (The email address you entered is displayed in the instructions on the screen.)
   b. If the email address you entered is correct, and you still haven't received an email message, please contact your NetSuite account administrator.
5. Click the link in the email message.

   Note: If you receive an error message that the link has expired, begin the password reset process again at step 1.
6. Answer the security questions to confirm your identity. Answers aren't case sensitive.

   Important: You have 20 attempts to answer all three of your security questions correctly. If you want the answers you enter to be visible on the screen, clear the check from the **Hide Answers** box. If you fail all 20 attempts, contact your account administrator for help.
7. Click **Submit**.
8. You're redirected to the Change Password page. Complete the required fields.

   See Change Password Link for more information. See also Creating a Strong Password.

   After you have successfully reset your password, a confirmation message is sent to the email address from which the reset request was generated.

   Note: If you have an Administrator role in this account, and are requesting a password reset, the confirmation email message is also sent to everyone with an Administrator role in that account. If you have an Administrator role in more than one account, and are requesting a password reset, the confirmation email message is sent to everyone who has an Administrator role in any of those accounts.

   If you still need assistance to access your account, contact your NetSuite account administrator to reset your password. When your password is reset, you must set up new security questions and answers.

My Login Audit Portlet

The **My Login Audit** portlet shows information about your login activity. You can add the **My Login Audit** portlet to your dashboard. Use the portlet to monitor your previous successful login, your previous failed login, the IP address associated with your login activity, the date when your password will expire, and other login information.

- The **My Login Audit** Portlet can't be added to the Customer Center or the Employee Center dashboards.
- The value shown for **Successful Logins** increments each time you switch roles. By switching to another role, you're (in a sense) logging in to a different role.

- The dates and times displayed in the portlet are based on the time zone you selected as your preference on the General subtab at Home > Set Preferences.
- If you're logged in and changed your password, refresh the portlet to display your new Password Expiration date.

To add the My Login Audit portlet to your dashboard:

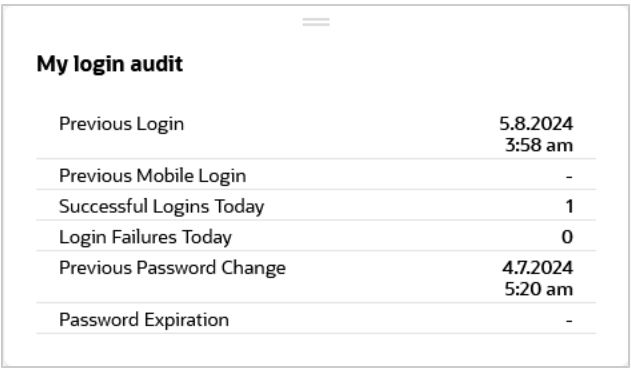
1. Click **Personalize** in the upper right corner of your dashboard or use **Personalize Dashboard** in the **Settings** portlet.
2. In the **Standard Content** tab of the **Personalize Dashboard** palette, click or drag and drop the **My Login Audit** icon.
3. To configure the login information displayed in the **My Login Audit portlet**, click **Set Up** in the portlet menu.

Choosing the Information Shown in the My Login Audit Portlet

Click the **Set Up** menu option in the **My Login Audit** portlet to open a window. Multiple tabs let you select the type of information you want to see in the portlet.

- **Last Login** tab - options include:
  - Last Login
  - Last Login Using Browser
  - IP Address of Last Login
  - Current Login Using Browser
  - IP Address of Current Login
  - Last Login Using Mobile Device
  - Last Login Using Web Service
- **Successful Logins** tab - options for successful logins include: Today, This Week, This Month.
- **Login Failures** tab - options: Last Login Failure, IP Address of Last Login Failure, and options for failed logins include: Today, This Week, This Month.

> **Note:** Entering an incorrect 2FA verification code is counted in the portlet as a Login Failure.



- **Password Updates** tab – options: Last Password Change and Password Expiration.
- **Mobile Devices** tab – options for successful logins using mobile devices include: Today, This Week, This Month.
- **Web Services** tab – options for successful logins using SOAP web services include: Today, This Week, This Month.

For more information about the options listed on each tab, refer to the field-level help.

Logging In Using Two-Factor Authentication (2FA)

2FA Setup for Users

Requiring a second factor for authentication is a method of improving security. Your administrator can assign you a role that requires 2FA authentication. You'll receive an email the first time you attempt to log in to your 2FA role. The email contains instructions and a verification code for your initial login to that role. The next time you log into a 2FA require role, you'll be prompted to set up your 2A preferences in NetSuite. Use an authenticator app to generate the verification codes necessary during login. While your session remains valid, you won't be asked again for a verification code when you switch between roles, even when you switch between roles in different companies.

If you're assigned a role that requires 2FA authentication, you must set up an authenticator application in NetSuite.

> **Note:** You must complete the initial 2FA setup in the NetSuite UI on your computer. You can log in using 2FA with the NetSuite Mobile application. However, it isn't possible to perform the initial 2FA setup from the mobile app.

For more information about setting up 2FA in NetSuite, see:

- Set up Your Preferences for Two-Factor Authentication (2FA)
  - Complete Your 2FA Setup
  - Supported Authenticator Apps
  - Troubleshoot Authenticator Apps

> **Important:** If you lose your phone, buy a new phone, change your authenticator app, you must reset (clear) your 2FA settings in NetSuite. See Reset Your 2FA Settings. After resetting, you'll start the 2FA setup process again.
>
> If you weren't faced with a 2FA challenge last time you logged in NetSuite, you'll need a verification code, backup code, or a help from your Administrator. If you can, reset your 2FA settings **before** you change your authenticator app.

To log in with a role that requires 2FA, you must first enter your email address and password on the NetSuite login page, and click **Log In**. After that step is successful, you're prompted for a verification code. For more information about using 2FA in NetSuite, see:

- Using 2FA
  - The Logging in Page for 2FA
  - Managing Your Trusted Devices
  - Reset Your 2FA Settings
  - Backup Codes for Two-Factor Authentication (2FA)

Set up Your Preferences for Two-Factor Authentication (2FA)

Authenticator apps for generating 2FA verification codes are supported in all NetSuite accounts. Authenticator apps can generate a verification code even without a cell service. For more information about selecting an authenticator app, see Supported Authenticator Apps.

You can skip the prompt to set up 2FA five times before you're required to select an authentication method and set up your authenticator app. Ten backup codes are generated when you complete the security setup page.

When using an authenticator app for 2FA, you must enter the verification code obtained from the app to complete the setup.

Important: If you want to change your 2FA preferences, you must reset your 2FA settings. For more information, see Reset Your 2FA Settings. This includes changing a device used for 2FA, or changing your authenticator app.

If you weren't faced with a 2FA challenge last time you logged in NetSuite, you'll need a verification code, backup code, or a help from your Administrator. If you can, reset your 2FA settings **before** you change your authenticator app.

For more information, see the following topics:

- Complete Your 2FA Setup
- Supported Authenticator Apps
- Troubleshoot Authenticator Apps

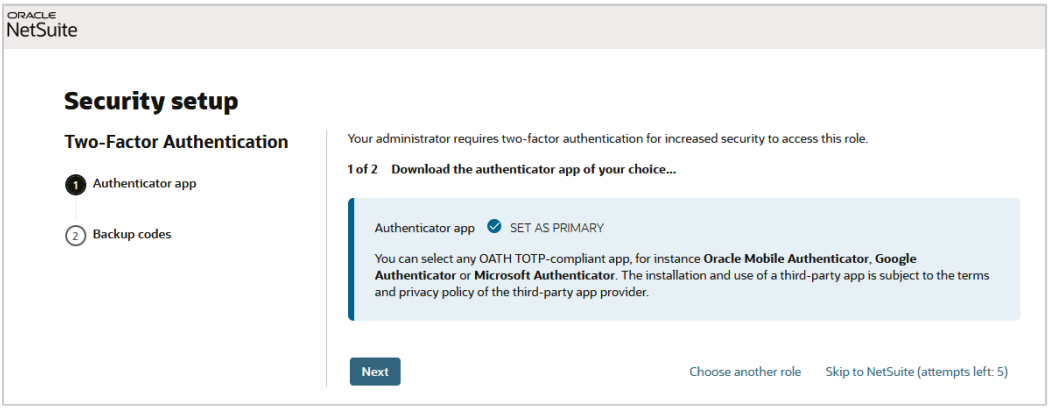
Complete Your 2FA Setup

The first time you log in to NetSuite with a 2FA required role, you're automatically shown the Security setup page. If you don't see the Security setup page, you might not be logged in to NetSuite with a role that requires 2FA. Switch roles to a role that's 2FA required. If you don't know whether you have a role that requires 2FA, ask your Administrator.

Note: You must complete the initial 2FA setup in the NetSuite UI on your computer. You can log in using 2FA with the NetSuite Mobile application. However, it isn't possible to perform the initial 2FA setup from the mobile app.

To complete your 2FA setup:

1. Install an authenticator app on your phone if you haven't done so. See Supported Authenticator Apps. Authenticator apps for generating 2FA verification codes are supported in all NetSuite accounts.



When you have installed the authenticator app, click **Next**.

Note: You can click **Skip to NetSuite** to dismiss this prompt up to five times. After the fifth time, you're required to set up an authenticator app or your phone number.

2. Using the authenticator app on your phone:
   a. Scan the QR code displayed, or manually enter the string of characters shown next to the QR code.

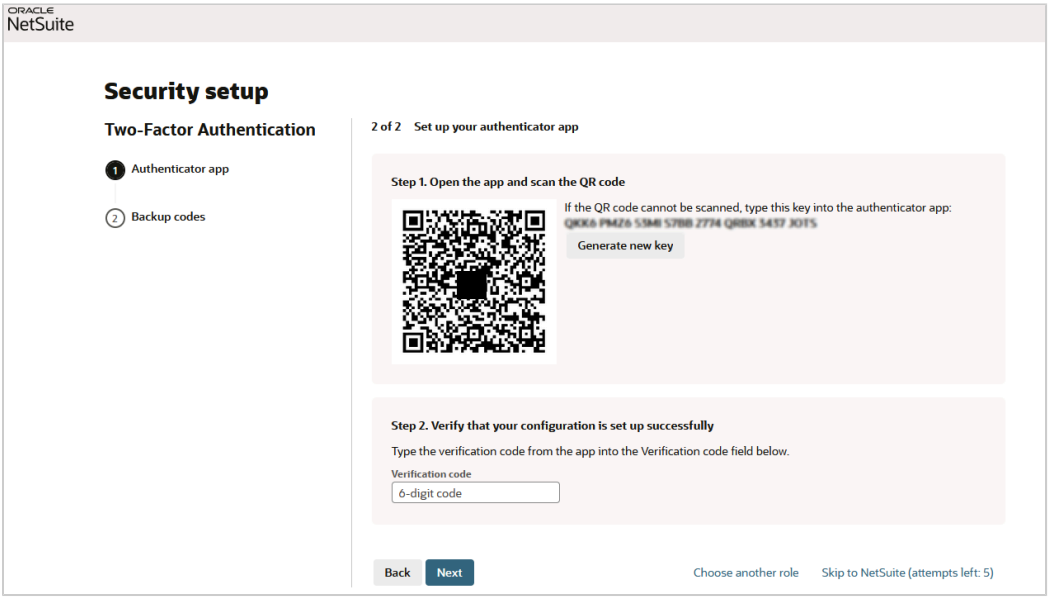
      The authenticator app generates a verification code.

   b. Enter the verification code.

      Verification codes generated by authenticator apps expire approximately every 30 seconds. Enter a new code if the initial code you receive expires.

      Important: If you've entered several codes in a row that have been refused, don't keep trying codes from your app. After five failed attempts, you'll lock yourself out of NetSuite. If the time on your phone or app isn't properly synchronized, NetSuite won't accept the verification codes generated by your app. See Troubleshoot Authenticator Apps for potential solutions.

   c. Click **Next**.



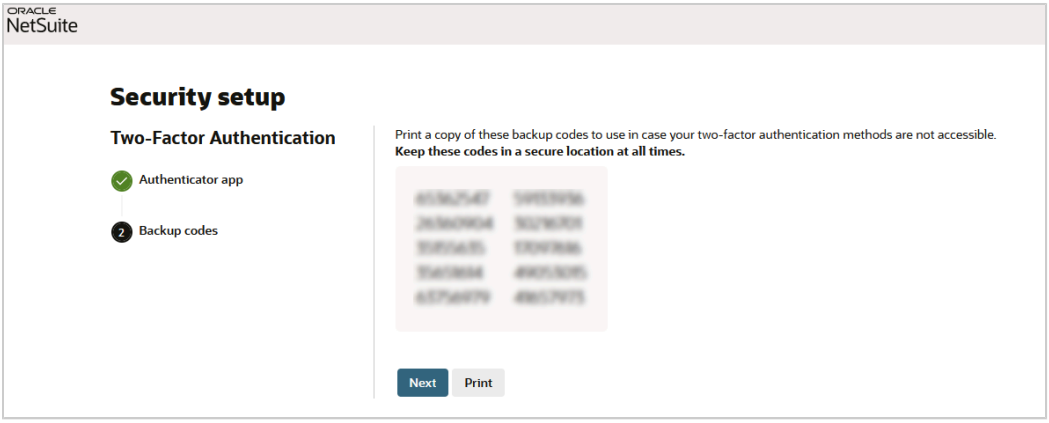
3. Ten backup codes are displayed in the UI.

Tip: You can use backup codes to reset your 2FA settings when you lose your phone or are unable to generate a verification code.

You should store them in a different device than the one you're using for verification code generating.

These unique backup codes can be used to log in to a 2FA role when you're unable to receive a verification code. Each backup code can be used only a single time.

> **Important:** Treat backup codes as securely as you would treat a password. This is the only time these unique ten codes are displayed in the UI. You can't retrieve these from the system after you close this window. If you lose these backup codes, you can generate new ones.



4. Click **Print** to print the backup codes, if needed.

> **Important:** Planning a trip to a location where you don't have phone service? Authenticator apps provide a verification code even when you have no cell service. What if you don't want to turn on your phone at all? You should also take your back up codes with you. Keep your backup codes secure. Don't store your backup codes with the device you use to log in to NetSuite.

5. Click **Next**.

After your 2FA setup is complete, the **Reset 2FA Settings** and **Generate Backup Code** links appear in your **Settings** portlet. If you can't locate the **Settings** portlet, see Finding Your Settings Portlet. If you don't see the links as expected, refresh your browser.

For more information, see the following topics:

- Supported Authenticator Apps
- Troubleshoot Authenticator Apps

Supported Authenticator Apps

You should use an authenticator application for roles that require 2FA. You can select an authenticator app from the vendor of your choice, as long it complies with the OATH TOTP standard. The following mobile phone apps are suggested:

- Oracle Mobile Authenticator
- Google Authenticator
- Microsoft Authenticator
- OKTA Verify

Download the appropriate authenticator app for your device to get started.

Note: The authentication application you choose must support the OATH TOTP, the IETF RFC 6238 standard. OATH is the Initiative For Open Authentication. TOTP means time-based one-time password. IETF is the Internet Engineering Task Force.

For more information, see the following topics:

- Complete Your 2FA Setup
- Troubleshoot Authenticator Apps

If you lost your device, buy a new one, or change your authenticator app, you must reset (clear) your 2FA settings in NetSuite. See Reset Your 2FA Settings. See also If You Lost or Replaced the Phone You Use for 2FA

Important: Don't install the authenticator app on the same device that you use for logging in to NetSuite.

Troubleshoot Authenticator Apps

Occasionally, NetSuite won't accept verification codes generated by your authenticator app. You may get an error message that the code is expired. If your phone (and perhaps your app) aren't synchronized to the proper time source, your verification codes won't work.

Important: If you've entered several codes in a row that have been refused, don't keep trying codes from your app. After five failed attempts, you'll lock yourself out of NetSuite.

If you need access to NetSuite right away, change the method by which you'll receive the next code to backup codes.

Use the following procedures to verify settings on your phone and on your authenticator app.

To synchronize time on your phone:

1. Go to Settings on your phone. Locate the settings for date and time.

   The navigation path to the date and time settings, and the exact name of the settings varies depending on the type of phone you have (Apple or Android) and the version of the operating system (OS) software on your phone.
2. If you have an iPhone, go to Settings > General > Date & Time. Verify that the switch for the setting **Set Automatically** is on.
3. If you have an Android, go to Settings > System > Date & Time. Verify that the switch for the settings **Automatic date & time** and **Automatic time zone** is on.
4. Older software versions on some phones might have a **sync time to server** setting. Clear the box if the sync time to server setting is checked. Verify that the time on your phone is synchronized to **network** time.

To synchronize time on your Google Authenticator app:

The Google Authenticator app has an internal time sync setting, **Time correction for codes**. If the time isn't correctly synchronized, the verification codes won't work. A Google Support site, Common issues with 2–Step Verification, details the steps for correcting the time in the app. Scroll down to the bottom of the page to the **My Google Authenticator codes aren't working (Android)** entry.

If synchronizing time doesn't help you, try resetting your 2FA.

For more information, see the following topics:

- Complete Your 2FA Setup
- Supported Authenticator Apps

Important: If you can't reset your log in using 2FA, and you can't reset your 2FA settings, contact your Administrator.

Using 2FA

Authenticator apps for generating 2FA verification codes are supported in all NetSuite accounts.

After completing the initial 2FA setup, see the following topics about using 2FA in NetSuite:

- The Logging in Page for 2FA
- Managing Your Trusted Devices
- Backup Codes for Two-Factor Authentication (2FA)
- Reset Your 2FA Settings
- If You Lost or Replaced the Phone You Use for 2FA
- Set up Your Preferences for Two-Factor Authentication (2FA)

Important: After you set up your 2FA preferences, you may want to change them. For example, you may want to change your authenticator app. Or you might have lost your phone, or bought a new one. To change your preferences, you must first reset (or clear) your 2FA settings in NetSuite. See Reset Your 2FA Settings. After the reset is completed, you must start the 2FA setup process from the beginning.

If you weren't faced with a 2FA challenge last time you logged in NetSuite, you'll need a verification code, backup code, or a help from your Administrator. If you can, reset your 2FA settings **before** you change your authenticator app.

2FA Access to Sandbox Accounts

When your sandbox is refreshed, roles that require 2FA authentication are copied from your production account to your sandbox. Your 2FA setup is also copied to your sandbox account. No additional 2FA setup is necessary.

The Logging in Page for 2FA

If your administrator designated one or more of your roles as **2FA authentication required**, you can use an authenticator app to obtain a verification code, or use one of your backup codes. For more information, see Logging In Using Two-Factor Authentication (2FA).

- You can decide whether you want to check the **Trust this device** box. For more information about this box, see Managing Your Trusted Devices.
- You can click the link to select backup codes for this log in attempt.

- Your other roles are listed on the page. You can select an alternative role by clicking **Choose** to the right of the role.

Important: After you set up your 2FA preferences, you may want to change them. For example, you may want to change your authenticator app. Or you might have lost your phone, or bought a new one. To change your preferences, you must first reset (or clear) your 2FA settings in NetSuite. See Reset Your 2FA Settings. After the reset is completed, you must start the 2FA setup process from the beginning.

If you weren't faced with a 2FA challenge last time you logged in NetSuite, you'll need a verification code, backup code, or a help from your Administrator. If you can, reset your 2FA settings **before** you change your authenticator app.

Managing Your Trusted Devices

When you're providing a verification code for logging in to NetSuite, take notice of the **Trust this device...** text on the **Logging in to...** page. The text specifies the length of time that a device can be trusted. The length of time is configured by your administrator for your 2FA role. If you use this device often to log in, you should check the box to the left of the text. Checking this box means you won't have to provide another verification code for the period of time that your administrator specified for this role. This trusted device time period can range from hours to days.

You can always remove the trust from this device, or from all of your devices, if needed. For example, if you lose or replace a device, you should remove the trusted status from that device. You can also restore the 2FA challenge for devices at any time. You have complete control over the management of your devices.

Marking a Device as Trusted When Logging in

See the following procedure for detailed instructions on how to make a device trusted during a login.

To mark a device as trusted when logging in:

1. Log in with a role that requires 2FA. Enter your email address and password on the NetSuite login page, and click **Log In**.

   After that step is successful, you're prompted for a verification code.
2. On the Logging in to ... page, enter the verification code.
3. Check the **Trust this device for ...** box, if needed.
4. Click **Submit**.

Note: You might have access to NetSuite accounts for more than one company. Marking a device as trusted for a 2FA authentication required role makes that device trusted across all of the companies to which you have access.

Managing Devices Marked as Trusted

See the following procedure for detailed instructions on how to manage devices marked as trusted.

To manage trust for your devices:

1. Find the **Settings** portlet on your Home page. If you can't locate the **Settings** portlet, see Finding Your Settings Portlet.
2. Click **Manage Trusted Devices.**

   In this example, you had previously marked a device as trusted upon login. Now you've changed your mind.
3. To reverse your earlier choice, select one of the **Restore 2FA ...** options.

   Remember that when the 2FA challenge is restored for a device, the next time you log in, you must have your authenticator app, or one of your backup codes available.

Backup Codes for Two-Factor Authentication (2FA)

Backup codes are provided when you successfully complete setup of your 2FA preferences in NetSuite.

> **Important:** Planning a trip to a location where you don't have phone service? Authenticator apps can provide a verification code even when you have no cell service. What if you don't want to turn on your phone at all? You should also take your back up codes with you. Keep your backup codes secure. Don't store them with the device you use to log in to NetSuite.

These codes are associated with your email address and are unique. You're the only person who can use these codes. A backup code is used for verification on login. Each code can be used only one time. You can generate new backup codes as needed. Backup codes don't expire, however, if you generate a new set of backup codes, the previous set of your codes is no longer valid.

You can generate ten new backup codes if you use all your existing backup codes, or if you lose them, or if you feel your existing codes may have been compromised. Generating new backup codes invalidates your previous codes.

To generate backup codes:

1. Find the **Settings** portlet on your Home page.

   If you can't locate the **Settings** portlet, see Finding Your Settings Portlet.
2. Click the **Generate Backup Codes** link.
3. Enter your password. You might also need to enter a verification code or backup code.
4. Click **Generate**.

   Ten backup codes are displayed.

   > **Important:** This is the only time these unique ten codes are displayed in the UI. You can't retrieve these codes from the system after you leave this window. If you lose these backup codes, generate new ones. Use the link in the **Settings** portlet. You may need a backup code if, for example, you must set up a different phone. For more information, see Reset Your 2FA Settings.
5. Click the printer icon to print the backup codes, if needed.

   > **Important:** Treat backup codes as securely as you would treat a password. Don't store your codes with the device you use to log in to NetSuite.
6. Click **Continue** to return to the NetSuite UI.

Each time you use one of your backup codes, you receive an email notification that one of your codes was used.

Important: If you lose your phone, buy a new phone, or change your authenticator app, you must reset (clear) your 2FA settings in NetSuite. See Reset Your 2FA Settings. After the reset is completed, you must start the 2FA setup process from the beginning.

If you weren't faced with a 2FA challenge last time you logged in NetSuite, you'll need a verification code, backup code, or a help from your Administrator. If you can, reset your 2FA settings **before** you change your authenticator app.

Reset Your 2FA Settings

You need to reset (clear) your 2FA settings in NetSuite if you:

- Change your authenticator app.
- Lose your phone.
- Buy a new phone.

Warning: Before you start with the reset process, make sure you have either a device that can generate a verification code, or a backup code. If you didn't face the 2FA challenge during login phase of this NetSuite session, you'll be asked to provide a verification code or backup code to finish the reset.

If you can't provide the code, contact your Administrator to help you reset your 2FA.

When you reset your 2FA settings, you remove your existing 2FA setup information from NetSuite.

Important: The Reset 2FA Settings link only clears your existing 2FA settings from NetSuite. You won't be able to set up your 2FA preferences again until the next time you attempt to access NetSuite with a 2FA-required role. In this case, you receive a verification code by email. Enter the code and click **Submit**. You're prompted to set up your 2FA preferences in NetSuite. See Set up Your Preferences for Two-Factor Authentication (2FA).

You can reset your 2FA settings from the **Settings** portlet on your Home page (Dashboard) by using the **Reset 2FA Settings** link.

To reset your 2FA settings:

1. Find the **Settings** portlet on your Home page. If you can't locate the **Settings** portlet, see Finding Your Settings Portlet.
2. Click **Reset 2FA Settings**.

   Note: If you don't see the **Reset 2FA Settings** link on your **Settings** portlet, it indicates that you have already reset (cleared) your 2FA settings from NetSuite. The next time you log in to NetSuite with a 2FA-required role, you'll be prompted to set up your 2FA preferences in NetSuite. See Set up Your Preferences for Two-Factor Authentication (2FA).

3. On the Reset 2FA Settings page, enter your NetSuite password. You might also need to enter a verification code or backup code.
4. Click **Reset**.

   When you click **Reset**, you remove your existing 2FA setup information. A confirmation screen states that your registered 2FA devices were successfully reset. You also receive an email notification from NetSuite that your registered 2FA devices have been reset, and can no longer be used to access your NetSuite account.

The next time you attempt to access NetSuite with a 2FA-required role, you receive a verification code by email. Enter the code and click **Submit**, and you're prompted to set up your 2FA preferences in NetSuite. See Set up Your Preferences for Two-Factor Authentication (2FA).

> **Note:** If you can't to log in to NetSuite to reset your 2FA settings, contact your account administrator for assistance. Also contact your administrator if you can't provide your password and a verification code during your 2FA reset attempt.

If You Lost or Replaced the Phone You Use for 2FA

If you have a 2FA-required role in NetSuite, you may be using a phone to obtain verification codes. If you lost your phone, or purchase a new phone, you must clear the settings (the setup information) of your old phone from NetSuite. After resetting your 2FA settings, you must set up your 2FA preferences in NetSuite again. Even if your phone number remains the same, you may not be able to transfer an authenticator app from one phone to another. You must set up your 2FA preferences in NetSuite again and install and configure an authentication app on your new phone.

> **Important:** If you lost your phone, you should remove the phone's 2FA settings from NetSuite as soon as possible. You may need to contact an Administrator of your NetSuite account for assistance. An Administrator can use the User Access Reset Tool to help you if you aren't able to log in to NetSuite.

Before you begin, verify that you have a current backup code available. If you can't locate your current backup codes, and you're able to log in to NetSuite, generate a new set of backup codes. See Backup Codes for Two-Factor Authentication (2FA). If you can't log in to NetSuite, contact your Administrator.

> **Warning:** Before you start with the reset process, make sure you have either a device that can generate a verification code, or a backup code. If you didn't face the 2FA challenge during login phase of this NetSuite session, you'll be asked to provide a verification code or backup code to finish the reset.
>
> If you can't provide the code, contact your Administrator to help you reset your 2FA.

To change your 2FA phone setup in NetSuite:

1. Click the **Reset 2FA Settings** link in the **Settings** portlet. See Reset Your 2FA Settings. You may be required to enter a backup code to complete the reset. A backup code is required if you're logged in from a device that isn't a trusted device in NetSuite. For more information about trusted devices, see Managing Your Trusted Devices.

   > **Note:** If you can't locate your **Settings** portlet, see Finding Your Settings Portlet.

2. Log out of NetSuite.
3. Log in to NetSuite with a 2FA-required role. You're prompted to set up your 2FA preferences before you can access NetSuite. See Set up Your Preferences for Two-Factor Authentication (2FA). A video about 2FA setup is also available: 2FA Setup for Users.
4. Follow the on-screen prompts to finish the setup process for obtaining verification codes. See Complete Your 2FA Setup.

Logging out of NetSuite

For security reasons, you should log out of NetSuite manually. To do this, hover over your name in the top right corner and choose **Log Out** from the dropdown list:

If you're inactive in the UI for a while, NetSuite logs you out automatically. By default, your session times out after 180 minutes.

An Administrator can set a custom session timeout. For more information, see the help topic User Interface (UI) Sessions.

Setting Personal Preferences

Setting up Your NetSuite Preferences

This section of NetSuite Basics describes the preferences that are available to you as a NetSuite user. The Set Preferences page displays options for most aspects of your NetSuite account. These preferences enable you to set up your NetSuite account to fit your needs. Your user preferences are constrained by the features enabled for your account, company account-level preferences, and the role-based dashboards that are set up by your account administrator.

Note: Your password isn't a personal preference, it's a setting in NetSuite. If you want to change your password, see Change Password Link. See also Finding Your Settings Portlet.

These preferences are specific to your NetSuite role. If you have multiple roles in NetSuite, the preferences you set in one role usually don't affect your other NetSuite roles. For example, changing the preference for date format affects all of your roles. However, changing the color for the NetSuite application only affects the role where you set the preference. The preferences you set don't apply to other NetSuite users, even if they have the same role as you.

Your account administrator can set preferences that may apply to you by default. The preferences your administrator sets can be for all users logging in with a role, for all users in a company, or if you're using NetSuite OneWorld, for all users in a subsidiary. See the help topic NetSuite Preference Levels Overview. However, the personal preferences you set normally take precedence over these other preferences set for a role, subsidiary, or company.

To set your personal preferences:

1. Go to Home > Set Preferences.
2. Click a subtab on the Set Preferences page to edit your preferences for a specific area of NetSuite.
3. When you're finished setting preferences, click **Save**.

   You can set preferences on multiple subtabs before you click **Save**.

   Your changes appear on the next transaction, or record you enter, or the next time you visit a page in NetSuite.

The topics listed below describe the options available on each subtab of the Set Preferences page:

- General Personal Preferences
- Personal Preferences for Appearance
- Personal Preferences for Transactions
- Analytics Personal Preferences
- Personal Preferences for Activities

  Also see Setting Calendar Preferences.
- Personal Preferences for Alerts
- Personal Preferences for Telephony
- Personal Preferences for Restricting Views

You may also see a Custom Preferences subtab if there are customizations in your account that you can configure for your instance of NetSuite.

General Personal Preferences

In the General subtab, you can set such preferences as a nickname, language, date and time formatting, warnings and notifications, and other.

Go to Home > Set Preferences. The General subtab is displayed by default. On this subtab you can set the preferences in the following table.

The following fields are available, based on the features in your NetSuite account, and the permissions associated with your NetSuite role.

Field Name	Function
User Profile	
Nickname	Enter the name that you want to appear in the From field of email messages you send from NetSuite. For example, you can send an email message by clicking the Email subtab on your employee record.
From Email Address	Enter the email address you want shown as the From address in email you send through the system. Replies to this email are sent to this email address as well. If you don't enter an email address here, email you send will show your login email address.
Signature	Enter a signature (in HTML markup) you want to appear at the end of email you send from NetSuite. **Note:** The HTML must be formatted correctly, including line breaks, hyperlinks, character formatting such as Bold, and any other special formatting. If the signature isn't correctly formatted, it won't display properly. For an example, see Customizing Email Signatures and From Fields.
Add Signature to Messages	Check this box if you want your signature automatically added to all fax and email messages you send. **Note:** If your signature is already included in the fax or email template you're using, your signature won't be added twice.
Localization	
Language	Select the language for your NetSuite account. For more information, see Choosing a Language for Your NetSuite User Interface.
Search Sorting	Select the alphabetical order to use for search results. ▪ **Language Specific** – the alphabetical order specific to your NetSuite language settings. ▪ **English (U.S.)** – the U.S. English alphabetical order.
Language of the Help Center	Select the language for the NetSuite Help Center. You can choose English, German, Japanese, and Spanish. **Note:** You can set a different language for the Help Center than the language you specify for the User Interface. Your preference takes effect the next time you open the Help Center and is maintained until you change it. For more information, see Choosing a Language for Your NetSuite User Interface.

Field Name	Function
	Note: You can also set this preference directly from the NetSuite Help Center using the dropdown list at the top right corner of the page. For more information, see Using the Help Center Window. Whether you select the language preference directly in the Help Center or from Home > Set Preferences, the preference is maintained until you change it.
PDF Language	This option isn't used anymore. To print your reports in a different language, change your NetSuite language in the Language field.
Accounting Context	If you have a OneWorld account and one accounting context is defined at Setup > Company > General Preferences., this dropdown list appears. An accounting context can be a one-to-one relationship between a country's local GAAP (Generally Accepted Accounting Principles) reporting requirements and a statutory chart of accounts (COA). It can also be a unique relationship that meets your company's specific needs. Accounting contexts are useful if you want to work in a local GAAP context instead of the consolidated context with one centralized COA. When you select an accounting context from this dropdown list, all transactions including system-generated transactions post to the defined COA account name and number. This field is blank by default. When blank, all transactions including system-generated transactions post to the consolidated accounts across all subsidiaries.
Time Zone	Select the time zone where you work. Time zone names are in IANA/Olson Value format and follow daylight savings time rules for each time zone. Note that the displayed GMT offset value doesn't reflect daylight saving changes that the system applies automatically. **Note:** If you change your time zone, it affects all roles associated with your email and password.
First Day of Week	Select the day that you want to start your week on. **Note:** Some reports in NetSuite recognize only Sunday as the first day of the week, regardless of the day you select for this preference.
Calendar System	You can only set a calendar preference if you choose Japanese as the Language preference. Select the calendar to use within NetSuite. - **Gregorian Calendar** - This is the default and the internationally accepted civil calendar. - **Japanese Imperial Calendar** - This is a specialized Japanese calendar. The imperial date format is required for some government documents and applications used in Japan.
Use Furigana Field	The Furigana field is only available on records in the NetSuite Japan edition when you select Japanese as the Language preference. Check this box if you want to sort lists of records by the Furigana field.
Formatting	
Date Format	Select the date format for all of your NetSuite roles.

Field Name	Function
	Note: If you change the date format, it affects all roles associated with your email and password. For more information, see the help topic Formatting for Dates, Numbers, Phone Numbers, and Time.
Long Date Format	Select how to display the month, day and year in NetSuite. **Note:** If you change the Long Date Format, it affects all roles associated with your email and password. For more information, see the help topic Formatting for Dates, Numbers, Phone Numbers, and Time.
Time Format	Select an option for how time displays in your NetSuite account. **Note:** If you change the time format, it affects all roles associated with your email and password.
Number Format	Select the format to display numbers online for transaction forms and entity forms for all of your NetSuite roles. For more information, see the help topic Formatting for Dates, Numbers, Phone Numbers, and Time. **Note:** If you change the Number Format, it affects all roles associated with your email and password.
Negative Number Format	Select the format to display negative numbers online for transaction forms, entity forms, and search results. For more information, see the help topic Formatting for Dates, Numbers, Phone Numbers, and Time. **Note:** If you change the Negative Number Format, it affects all roles associated with your email and password.
Phone Number Format	Select an option to display phone numbers in your NetSuite account. This phone number format is used on all online forms that you print. This setting only applies to seven and ten digit phone numbers.
Auto Place Decimal	Check this box to insert a decimal point between the second and third digit from the right when you enter numbers. When you first start using NetSuite, this preference is activated. **Important:** Clear this box if you're using the Software Verticals Contract Renewals module. Enabling this preference may cause unwanted updates to transaction amounts calculated by Contract Renewals transaction processing. For more information, see the help topic Setting Up Contract Renewals Preferences.
CSV Column Delimiter	Select the symbol to be used as the default column separator when importing data from CSV files. For more information, see the help topic Setting CSV Import Preferences.

Field Name	Function
CSV Decimal Delimiter	Select whether you want to use a period or a comma as the default decimal mark in numbers in the CSV files you import. For more information, see the help topic Setting CSV Import Preferences.
Defaults	
Use Multicurrency Expense Reports	If the Multiple Currencies feature is enabled in your account, check this box for expense reports to enable use of foreign currencies by default. When you enable this option, the Use Multi Currency box on Expense Report transactions is checked by default.
Download PDF Files	Check this box if you use PDF forms and save them as files. Clear the box if you use HTML forms, or if you print PDF forms without saving them as files.
Address Mapping Type	Select a service for generating maps for addresses on forms and records. You can click the Map icon next to an address on a form or record to see the map. For more information, see Mapping Addresses on Records and Transactions.
Show Internal IDs	Check this box to be able to view the internal IDs for fields and records in the NetSuite application. **Note:** The Show Internal IDs field is only available when at least one of the following features is enabled in your account: Client SuiteScript, Server SuiteScript, SuiteScript Server Pages, SuiteFlow, or Web Services (on the SuiteCloud subtab) or Advanced Site Customization or SuiteCommerce Advanced (on the Web Presence subtab). For more information, see the help topic Enabling Features. SOAP web services and SuiteScript code need to reference internal IDs to uniquely identify objects, so you should enable this preference whenever you're working with SOAP web services or SuiteScript. When this preference is enabled: ▪ You can view the internal ID for a field by clicking on that field's label to open the field level help popup window. The internal ID is displayed in the lower right corner of this window. ▪ You can view the internal ID for a record or a custom field in an Internal ID column that displays on a list or search results page for that type of record or custom field.
Only Show Last Subaccount	Check this box to indent subaccounts in list fields on transactions and forms. For example, with the box checked, subaccounts appear indented under the parent account: Parent account Subaccount 1 Subaccount 2 With the box cleared, subaccount names include the parent name: Parent account Parent account: Subaccount 1 Parent account: Subaccount 2

Field Name	Function
Only Show Last Subentity	Check this box to indent subrecords in dropdown lists on transactions and forms. This applies to relationship records, such as customers, partners and leads. For example: Parent customer Subcustomer 1 Subcustomer 2 When the box is cleared, subentity record names include the parent name: Parent customer Parent customer: Subcustomer 1 Parent customer: Subcustomer 2 **Note:** When records display in popup lists, subentity names always include the parent name.
Only Show Last Subitem	Check this box to show only subitems and omit parent items in dropdown lists on transactions and forms. For example: Subitem 1 Subitem 2 When the box is cleared, subitem names include the parent name: Parent item Parent item: Subitem 1 Parent item: Subitem 2 **Note:** When records display in popup lists, subitem names always include the parent name.
Do not Display Customer Satisfaction Surveys	Check this box to opt out of in-page satisfaction surveys.
Enable NetSuite Guided Learning	Check this box to enable the NetSuite Guided Learning for your account. NetSuite Guided Learning tool provides step-by-step instructions to help you complete tasks in NetSuite. For more information, see NetSuite Guided Learning.
Messages	
"Save Changes" Warnings	Check this box to see a warning when you're about to leave a page before submitting the transaction you were working on.
Limit CC Field to Contacts & Employees	Check this box so that email messages are only copied to contacts or employees.
Default Issue Email Notification	Select one of the following options to be notified at your login email address when an issue you have submitted or edited changes: ▪ **Never** – Select this option if you don't want to receive any email notifications about changes to issue statuses. ▪ **On Any Change** – Receive an email every time someone edits the issue record.

Field Name	Function
	▪ **When Base Status is Open** – Receive an email when the issue status changes to a base status of Open. ▪ **When Base Status is On Hold** – Get an email when the issue status changes to a base status of On Hold. ▪ **When Base Status is Resolved** – Get an email when the issue status changes to a base status of Resolved. ▪ **When Base Status is Closed** – Get an email when the issue status changes to a base status of Closed. **Note:** If you set issue notification preferences through the Customer Center, they go back to company default settings if your Customer Center access is suspended.
Notify Me Upon Issue Assignment	Check this box to receive a notification at your login email address when an issue is assigned to you.
Show Notification When AI Feature Is Used	Clear this box to stop showing the AI confirmation message when you use Text Enhance. This box is checked by default. You can also turn off this preference from the AI confirmation message. Leave the **Do not show this message again** box checked, and then click **OK** to close the AI confirmation message.
Optimizing NetSuite	
Delay Loading of Sublists	Check this box to delay loading information about subtabs until you click the specific subtab. **Note:** Setting this preference improves page-load times.
Number of Rows in List Segments	Enter the maximum number of records to display in each segment. For example, if you have 200 customers, enter 25 in this field to see them in groups of 25 per page. To go through the list of results, select from the dropdown list or use the previous and next arrows on the toolbar. You can change this number up or down based on your visual and scrolling preferences. **Note:** Setting the list segment to 25 or less improves page-load times.
Maximum Entries in Dropdowns	Enter a number beyond which a dropdown list becomes a popup list. When the list reaches the maximum you set here, the list displays in a pop up window. Be aware that this number is a guideline. If the list of values displayed for a field is dynamic, you might still see a popup even for a smaller number of values. The use of a popup is especially likely for any custom field with values sourced from a dynamic list because the size of the list could sometimes be above the maximum.

Field Name	Function
	Note: Setting the maximum entries to 25 or less improves page-load times.
	Note: The Case/Task/Event field for time transactions is displayed as a dropdown list only if the sum of all company-wide case, task, and event records is less than 5000 and less than the number entered here. Roles that can enter time transactions on behalf of other employees will always have a pop-up field displayed.
Allow Favorites in Dropdowns	You can select up to five favorite items in the Customer, Add Multiple, and Items fields on sales orders. In the Add Multiple field, you can show only your favorite items by selecting the **Show favorites only** box. To mark an item as a favorite, click the star icon next to the item name in the dropdown list. Favorites are associated with your personal preferences and are specific to your NetSuite account and role.
Type-Ahead On List Fields	When you check this box, NetSuite shows a list of matching records you can select from when you type characters into a dropdown list field. This preference may enable you to enter data into list fields more quickly.
Require Exact Match on Item Type-Ahead	When you turn on the Type-Ahead On List Fields option (above), check this box so that NetSuite selects a record based on an exact match of the characters you type. Otherwise, NetSuite chooses a record based on the first character you typed.
Show Quick Add Row on Lists	Check this box to use quick add on lists that can be edited inline. Quick add enables you to create new records from lists and only add basic information. You can turn this preference off on individual lists.
Display Bounce Warning on Campaigns	Clear this box to restrict the automatic scanning of hard-bounced email addresses in your marketing campaign. When this preference is turned off, you can manually screen hard-bounced email addresses.
Do not Calculate Balances on Customer Record	Customer records include a Balance Information subtab. The information in this subtab is calculated when you open a customer record. Check this box to disable this calculation when you open a customer record. This may load customer records faster.
Prefer Native Select Fields over NS Dropdowns In Internet Explorer	**Important:** This field is only for users of the Internet Explorer browser. Select this box to use native dropdown lists rendered by your Internet Explorer browser rather than dropdown lists rendered by the NetSuite user interface. This can improve page performance, particularly on pages with many dropdown lists. Page performance varies due to the interaction of many factors, including: ▪ the type and complexity of the page ▪ whether the page has been customized ▪ the number and type of features enabled in an account If you continue to experience less-than-optimal page performance even with this option selected, please contact Technical Support.
SuiteCloud Development Framework	
Show App ID Field	Check this box to display the App ID field on custom objects that are supported by SDF.

Field Name	Function
Show ID Field on Sublists	Check this box to display script ID fields in sublists that are supported by SuiteCloud Development Framework.

Choosing a Language for Your NetSuite User Interface

With the Multi-Language feature, you can choose the language in which NetSuite displays whenever you log in to your account.

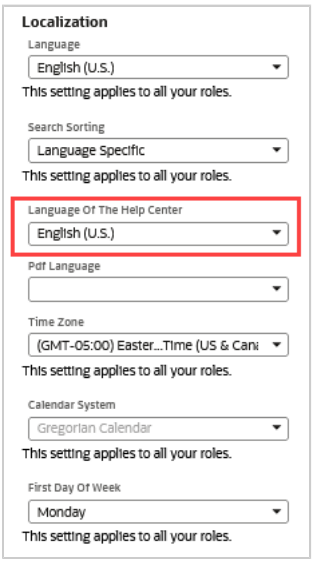
This preference is available only if a user with the Administrator role has enabled the Multi-Language feature at Setup > Company > Setup Tasks > Enable Features, on the Company subtab.

To set your language preference:

1. Go to Home > Set Preferences.
2. On the **General** subtab, in the Localization section, **Language** field select a language. You can choose from the following:
   - Chinese (Simplified)
   - Chinese (Traditional)
   - Czech
   - Danish
   - Dutch
   - English (AU)
   - English (CA)
   - English (International)
   - English (UK)
   - English (U.S.)
   - Finnish
   - French
   - French (Canada)
   - German
   - Indonesian
   - Italian
   - Japanese
   - Korean
   - Norwegian
   - Portuguese (Brazilian)
   - Russian
   - Spanish
   - Spanish (Latin America)
   - Swedish
   - Thai
   - Turkish
   - Vietnamese

> **Important:** For the languages listed above, NetSuite provides translation strings for the user interface and for printed transaction forms. The Multi-Language feature also lets you use several additional languages for website translations, but you must define these languages in company preferences and provide translation strings. See the help topic Configuring Multiple Languages.

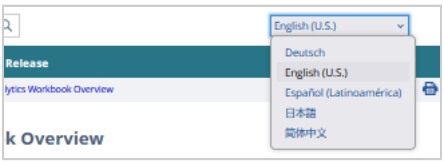
3. In the **Language of the Help Center** field, you can select a different language for the Help Center.



The following languages are available:

- 简体中文(Chinese Simplified)
- Deutsch (German)
- English
- 日本語 (Japanese)
- Español (Spanish)

> **Note:** You can also set this preference directly from the NetSuite Help Center using the dropdown list at the top right corner of the page.



For more information, see Using the Help Center Window. Whether you select the language preference directly in the Help Center or from Home > Set Preferences, the preference is maintained until you change it.

4. Click **Save**.

This preference doesn't affect others with access to your account. For the best results when viewing translated NetSuite pages, set your browser to view UTF-8 encoded pages.

In Firefox, go to Tools > Options, and in General options, click Languages. In the Default Character Encoding field, select **Unicode (UTF-8)**.

Mapping Addresses on Records and Transactions

You can quickly view maps for addresses on records and transactions by clicking the **Map** links.

To select the mapping website to use to display maps, go to Home > Set Preferences. In the **Address Mapping Type** field on the General subtab under Defaults, select whether to open maps in Google Maps, Yahoo! Maps, or Mapquest.

> **Note:** There's also a **Custom** option; if you select this option, NetSuite uses the mapping type set by the account administrator for each country. For information about setting address mapping types for different countries, see the help topic Supported Countries.

This feature is especially useful for:

- Deliveries
- Door-to-door sales campaigns
- Service calls
- Contacting hard-to-reach customers, contacts or employees

Transactions or records with address fields have a Map link next to the address. After you fill in the street address, city, state, zip code and country fields on records, you can click the icon to view a map of the address location. This map opens in a new window, where you can zoom in or out, and you can print step-by-step driving directions from any location.

The Map link shows on transactions next to Bill To and Ship To fields. On records, the icon shows next to Billing Address and Shipping Address fields.

When viewing a record, click the underlined address to view the map. When you're finished viewing your map or driving directions, close the map window to return to NetSuite.

Personal Preferences for Appearance

In the Appearance subtab, you can set preferences such as color theme, fonts, chart theme, centers and dashboards, and other.

Go to Home > Set Preferences and click the Appearance subtab to set any of the preferences in the following table.

The following fields are available, based on the features in your NetSuite account, and the permissions associated with your NetSuite role.

Field Name	Function
Redwood Experience	
Redwood Experience	The Redwood Experience is a theme that gives NetSuite a different look and feel. This theme offers different colors, icons, and fonts for many NetSuite pages, portlets, and features. Each release, the Redwood Experience theme is applied to more NetSuite functions which are listed in respective release notes. By default, the Redwood Experience theme is enabled for all users of newly provisioned accounts. For the rest of accounts, the Redwood Experience theme is enabled only for the Login and Security Questions pages. If you want to use it everywhere in NetSuite, click **Enable**. To differentiate among accounts, including production, release preview, sandbox, and development, the header strip of each account is in a different color. You can also differentiate among roles by setting the color for your role in the **Color Theme** field.

Field Name	Function
	If you decide to disable the Redwood Experience theme, a questionnaire appears asking you why you're disabling the theme. This information will help us improve your experience with NetSuite. We appreciate your feedback.
Color Theme	Select a color theme for your NetSuite pages and tabs. Select a color and click **Save** to see how the scheme looks on your monitor. Although you can't modify or add new color themes, some special themes are available in certain editions of NetSuite in addition to the basic color themes. ▪ The US edition has color themes for schools (various colleges and universities) organized by conference. ▪ The Canadian edition has color themes for National Hockey League (NHL) teams. ▪ The UK edition has color themes for Premier League clubs. **Note:** If you set the Accessibility preference for displaying a theme with optimal color contrast, the Color Theme preference is disabled. When the Redwood Experience is enabled, you can differentiate among roles by changing the color of the user name and role in the header. Simply set the color for your role in the **Color Theme** field.
Styles	
Screen Font	Open Sans is the default font for NetSuite. You can select a different font from the Screen Font dropdown list in the Appearance subtab. Your selection changes the font on your pages only and only for your current role. It doesn't affect any forms or your website. **Note:** To change the size of the font, use your browser zoom controls.
Compensate for Large Fonts	Displays easier-to-read layouts if you have set your computer display to use large fonts.
Density Setting for Internet Explorer	Select the density of your NetSuite pages. This setting is for Internet Explorer 10 and higher. The options are: ▪ **Normal** – 100% zoom ▪ **Higher Density** – similar to 80% zoom ▪ **Very High Density** – similar to 67% zoom Other browsers, such as Chrome and Firefox, let you set the zoom independently for each website.
Chart Themes	
Chart Theme	Defines a default appearance for data in all dashboard charts. (You can override this in individual portlets.) Options are: ▪ **Basic** – provides limited color contrast (the default) ▪ **Colorful** – provides more color contrast ▪ **Match Color Theme - Bold** – harmonizes with your choices in the Colors section, using bolder shades ▪ **Match Color Theme - Light** – harmonizes with your choices in the Colors section, using lighter shades A thumbnail is displayed to represent the look of each Chart Theme option.
Chart Background	Defines a default display behind data in all dashboard charts. (You can override this in individual portlets.) Options are:

Field Name	Function
	▪ **Lines** (the default setting) ▪ **Bands** ▪ **Grid**
Centers & Dashboards	
Use Classic Interface	Check this box to use the Classic Center as your NetSuite interface. When you enable this option, you see the same tabs in NetSuite that the Administrator role does. **Note:** You won't see this option if you're using an Administrator role. If all users enable this option, they all can see the same tabs and use the same navigation paths. Note that the functions available to a role don't change based on the interface you use. Only the presentation of tabs and the organization of functions within tabs are affected.
Landing Page After Login	Select the tab that you want to be the first page displayed when you log into your NetSuite account. If you don't make a selection in this dropdown list, your Home page is the initial landing page. The list of possible landing pages includes all standard tabs and custom tabs in your center. The page you select here is overridden if your account administrator sets the general company Landing Page preference to use a custom landing page created by a Suitelet.
Show Portlet Hint	Check this box to display a popup notice when dashboard portlets take too long to load and time out. To improve page load time on the dashboard, minimize the slow-loading portlets.
Set Customer Dashboard as Default View on Customer Record	Check this box to set the customer dashboard view as the default view on customer records.
Entry Forms	
Limit Entry Forms to Two Columns	Check this box to limit the columns of fields on entry forms to two columns. By default, fields on entry forms are arranged in three columns.
Expand Tabs on Entry Forms	Check this box to expand tabs on your NetSuite pages.
Enable Rich Text Editing	Check this box to use the rich text editor in text fields. Each field includes the Formatted Text header with a link you can click to enter HTML Source Code. The Formatted Text header includes Font, Size, and Color dropdown lists, and a toolbar with text style, alignment, and paragraph format options. Use these tools to format text you enter into the field. Clear the box to remove the Formatted Text header on text fields.
Default Rich Text Editor Font	Select the default font for rich text editor fields.
Default Rich Text Editor Font Size	Select the default font size for rich text editor fields.
Sublist Column Name Tooltip	Check this box to enable the Inline Editor Sublist Tooltip. When you're editing a sublist inline and you hover over a cell, the tooltip appears and shows the column name. If a sublist has many lines, you can still see the column name as you scroll.

Field Name	Function
Accessibility	
Display Default Theme with Optimal Color Contrast	Check this box to display a theme with optimal contrast that can aid users with low vision to view the UI. **Note:** If you set this preference, the Color Theme preference is disabled.

Personal Preferences for Transactions

In the Transactions subtab, you can set preferences such as auto fill transactions, transaction warnings, printing, transaction email attachment, and other.

Go to Home > Set Preferences and click the Transactions subtab to set any of the preferences in the following table.

The following fields are available, based on the features in your NetSuite account, and the permissions associated with your NetSuite role.

Field Name	Function
Basic	
Auto Fill Transactions	If you check this box, information about transaction pages is automatically filled in based on the last transaction for the entity you have chosen. If you use a custom form, NetSuite will load the same custom form as was used for the last transaction for the entity, as well. If you clear this box, click the Auto Fill button on transaction pages and information fills in based on the last transaction for the entity you have chosen. If you use a custom form, NetSuite will populate the custom form you currently have open with the information from the last transaction, and not the custom form that was used in the last transaction. The date and period information about any transaction remains current and all auto filled fields can be changed.
Alphabetize Items Regardless of Type	Check this box to list items in alphabetical order, regardless of item type, when you search for items in the Item column on transactions such as Sales Orders, Purchase Orders, and Inventory Adjustments. Clear this box to display items listed in the Item column on transactions grouped by item type and listed in alphabetical order. This preference doesn't affect the order of items in the Items subtab on transactions.
Warnings	
Duplicate Number Warnings	Choose from the list how NetSuite responds when you enter a document number you've used before.
Inventory Level Warnings	Check this box to see warnings when you sell inventory items with quantities at or below their reorder points. You must also set these minimum quantities in the Reorder Point field on item records at Lists > Items.
Customer Credit Limit Handling	Choose how you want to handle customer credit limits: ▪ **Ignore** – Enables you to enter sales orders and invoices that exceed the customer's credit limit without a warning.

Field Name	Function
	▪ **Warn Only** – Generates a warning when you enter a sales order or invoice that exceeds the customer's credit limit. The warning displays in a popup window so you can choose to enter or cancel the transaction. ▪ **Enforce Holds** – Blocks you from entering a sales order or invoice that exceeds the customer's credit limit.
Vendor Credit Limit Warnings	Check this box to receive a warning when you exceed the credit limit for a vendor.
Printing	
Print Using HTML	Check this box to print transaction forms in HTML format. Clear this box if you prefer to print transactions forms in PDF format. You need Acrobat Reader to print PDF forms.
Print GL Impact Per Subsidiary	Print separate GL impact statements for transactions with multiple lines assigned to different subsidiaries (for example, an intercompany journal). NetSuite will print a statement for each subsidiary in the transaction. For more information, see the help topic Printing the GL Impact for a Transaction.
Transaction Email Attachment Format	Choose the format for which transaction email attachments are sent. ▪ **HTML** – Sends email attachments in HTML format. ▪ **PDF** – Sends email attachments in PDF format. **Note:** If you select the HTML option as a transaction email attachment format, the system won't use the template set in custom transaction forms.
Horizontal Print Offset	Enter a positive number in inches to move the text to the right. Enter a negative number in inches to move the text to the left.
Vertical Print Offset	Enter a positive number in inches to move the text lower. Enter a negative number in inches to move the text higher.

Your administrator can customize the layout of your printed forms using advanced PDF/HTML templates. For information, see the help topic Advanced PDF/HTML Templates.

Analytics Personal Preferences

In the Analytics subtab, you can set preferences such as report by period, default bank account, search, PDF orientation and font size, CSV export, and other.

Go to Home > Set Preferences and click the Analytics subtab to set any of the preferences in the following table.

The following fields are available, based on the features in your NetSuite account, and the permissions associated with your NetSuite role.

Field Name	Function
Reporting	
Report by Period	Select what type of reports you want to view by period. **All Reports** – Select this option to view all applicable reports by period. When this option is selected, reports that support reporting by period include a period filter in the report footer.

Field Name	Function
	Financials Only – Select this option if you want specific financial reports reported by period. For a list of these financial reports, see Report by Period: Financials Only Reports. **Never** – Select this option if you don't want to exclude reports that can be run in both by date and by period mode. **Note:** When you select **Financials Only** or **Never**, you may encounter problems with data for KPI scorecards that use accounting periods. **Note:** In OneWorld accounts, if you post transactions with dates outside posting periods, best practice is to run all reports by period. Select **All Reports**. This option requires the Accounting Periods feature to be enabled. For details, see the help topic Accounting Period Management.
Show Reports in Grid	Check this box to show reports in the grid.
Customize Font on Financial Reports	Check this box to configure the font settings on custom financial reports.
Print Company Logo	Check this box to include your company logo on all printed reports.
Display Report Title on Screen	Check this box to display the report title, company name, and date or period range at the top of all reports displayed on your screen. Even when this preference isn't enabled, this title information still prints on reports. To display report title information only on selected reports, don't check this box. Instead, click Options in the footer of each report, and check the Display Title box.
Display Report Description	Check this box to display customization details as part of report title for all reports. These details are from the Description field in the More Options step of the Report Builder. To disable the display of customization details for selected reports, click Options in the footer of each report, and clear the Print Description box.
Default Bank Account	Select the bank account to use as the default account for the Bank Register listed on the Reports page and the Bank Balance snapshot on the Home page.
Calculate Forecasts as Weighted	Check this box to show the weighted forecast value instead of total projected forecast values on reports. You can set this preference at both Home > Set Preferences, and at Setup > Sales > Sales Preferences, on the Forecasts subtab. The setting you select for this preference on the Set Preferences page overrides the company wide setting for this preference on the Sales Preferences page.
Search	
Show List When Only One Result	Check this box to list search results, even when there's only one result. If you clear this box and there's only one result from a search, the record or transaction automatically opens.
Quick Search Uses Keywords	Check this box so that the Quick Search portlet returns records with names that **start with** AND records with names that **contain** the keywords you enter. If you clear this box, the Quick Search portlet displays **Starts With** and **Contains** buttons. Searches can return records with names that start with keywords OR records with names that contain keywords, based on the button you select.

Field Name	Function
Popup Search Uses Keywords	You use popup searches when you type a keyword and press Tab to make a selection in a field on a transaction or form. Check this box to base search results for popup lists only on keywords that start with and include all the search terms entered. **Note:** Enabling this preference removes the Starts With and Contains options from the Quick Search portlet.
Include Inactives in Global & Quick Search	Check this box to include inactive records in results returned for keywords entered in the Search field or in the Quick Search portlet. By default, only active records and transactions are searched with these fields.
Popup Auto Suggest	Check this box to have NetSuite suggest matches for the text you enter in fields as you type. You can select from the list of matching records to select the record you need.
Global Search Auto Suggest	This box is checked by default. NetSuite suggests matches for the text you enter in the Search field, automatically as you type. You can select from the list of suggested records to go directly to the record you need.
Page Search	Enable the Current Page Results feature to see enhanced results in the global search. This option is enabled by default. For more information, see the help topic Current Page Results.
Global Search Sort by Name/ ID	Check this box to sort global search results by name, instead of by record type and then by name within each record type.
Global Search Customer Prefix Includes Leads and Prospects	By default this box is cleared, and when you type the **cu** prefix in the Search field, only customer records display in search results. Check this box to display leads, prospects, and customers in your search results when you type the **cu** prefix in the Search field.
Global Search Includes Transaction Numbers	By default, when searching for a number in Global Search, the search results only include results by document number. When this box is checked, search results include results whose document number AND transaction number match the number searched.
PDF	
PDF Page Orientation	Select landscape or portrait orientation for your PDF output when you export a report or search results as a PDF.
PDF Font Size	Select a font size for the PDF output when you choose to export a report or search results as a PDF.
Export	
CSV Export Character Encoding	Select an alternate character encoding for CSV exports of lists, reports, and searches. Default encoding is UTF-8. Other options are Windows 1252, the default format for Microsoft Excel, and Shift-JIS, the most widely used format in Japan.
KPI and Snapshot	
Accounting Book	If you use the Multi-Book Accounting feature, select the Accounting Book you would like to use for reporting.
KPI Scorecard with Period Specific Consolidation Rates	Select the accounting period that provides the consolidation rates you would like to use in the KPI Scorecard report.

Field Name	Function
	The period consolidation rates you choose affect these KPIs: ▪ Bank Balance ▪ Credit Card Balance ▪ Receivables ▪ Payables ▪ Other Current Assets ▪ Other Current Liabilities **Note:** If Multi-Book Accounting is provisioned in your NetSuite OneWorld account, the accounting book selected on the user preference reflects the accounting book currency. This preference doesn't affect standard KPIs. This preference is available for all NetSuite user roles.

Report by Period: Financials Only Reports

The following is a list of financial reports that properly process when the Report by Period preference is set to Financials Only:

- Account Detail
- Balance Sheet
- Balance Sheet Detail
- Budget Income Statement
- Budget Income Statement Detail
- Budget vs. Actual
- Cash Flow Statement
- Cash Statement
- Cash Statement Detail
- Comparative Balance Sheet
- Comparative Income Statement
- Deferred Revenue By Customer
- Deferred Revenue By Item
- Deferred Revenue By State
- Deferred Revenue Reclassification
- Deferred Revenue Rollforward By Customer Summary
- Deferred Revenue Rollforward Summary
- Deferred Revenue Rollforward Transaction Details
- Financial Layout Description
- General Ledger
- GL Audit Numbering
- GST on Purchases Detail
- GST on Purchases Summary
- GST on Sales Detail
- GST on Sales Summary

- Income Statement
- Income Statement Detail
- Realized Exchange Rate Gains and Losses
- Revenue By Customer
- Revenue By Item
- Revenue By State
- Trial Balance
- Unrealized Exchange Rate Gains and Losses
- VAT on Purchases Detail
- VAT on Purchases Summary
- VAT on Sales Detail
- VAT on Sales Summary

Note: If you have enabled the GL Audit Numbering feature, select Financials Only to filter the GL Audit Numbering Report by accounting period.

Personal Preferences for Activities

Set your personal preferences before you start working with your calendar, and activities such as phone calls and tasks. Here, you can set preferences for sending email invitations, types of reminders, and more. You can also set a default priority for tasks and phone calls. If you use the Outlook Integration feature to synchronize records, you can set a default category for contacts synchronized between Outlook and NetSuite.

Go to Home > Set Preferences, and click the Activities subtab to set any of the preferences in the following table.

The following fields are available, based on the features in your NetSuite account, and the permissions associated with your NetSuite role.

Field Name	Function
Calendar	
Edit Activities from Calendar	Check this box to open events in Edit mode when you click events on your calendar.
Send Invitation Emails	Select recipients for email notification about events. - **Internally** - Send email only to employees and groups of employees in your NetSuite account. - **To All Invitees** - Send email to everyone invited, including customers, contacts, partners, etc.
Restrict Invitees to Employees	Check this box to choose only employees as invitees on event records.
Default Event Access Setting For New Events	Choose an option for Event Access. Your selection determines how new events appear to others who have access to the calendar where you create events. You can change Event Access at any time on individual event records. Choose one of the following: - **Public** - Anyone can see public events, tasks, and calls.

Field Name	Function
	▪ **Private** – Only you and your account administrator can see events, tasks, and calls you mark as private. Other invitees with access to your calendar can also see private events. ▪ **Show as Busy** - Events marked to show as busy show on your calendar as unavailable time. Only you and your account administrator can see the details of these events.
Default Reminder Type	Specify the type of event reminder that you prefer: ▪ **None** – Select this option if you don't want to receive reminders about your calendar events. ▪ **Popup Window** – Select this option if you want to receive calendar reminders in a popup window. ▪ **Email** – Select this option if you want calendar reminders emailed to you.
Default Reminder Time	Select how long before an event you want to receive reminders.
Play Audio with Popup Event Reminders	Check this box to play a sound with popup event reminders. You must have your browser set to play sounds in websites.
Tasks & Phone Calls	
Default Priority for Tasks	Select a default priority for new tasks. Priority options include **Low**, **Medium**, and **High**. You can change the priority for a task in the Priority field on the task record.
Default New Tasks Public	Check this box to make all new tasks public by default. You can mark a task private by checking the Private Task box on the task record
Default New Phone Calls Public	Check this box to make all phone calls you create public by default.

Personal Preferences for Alerts

In the Alerts subtab, you can set preferences such as time for an alert email, email address, and other.

Go to Home > Set Preferences, and click the Alerts subtab to set any of the preferences in the following table.

The following fields are available, based on the features in your NetSuite account, and the permissions associated with your NetSuite role. For more information about setting preferences for email alerts, see Receiving Email Alerts. For more information about subscribing to email alerts, see the help topic Enabling Saved Search Email Alerts.

Field Name	Function
First Selection	Select an initial time to receive an email message containing the latest information about the events, reminders, key performance indicators, and report snapshots displayed in portlets on your Home page. **Note:** By default, this value is set to 12:00 am. If you don't want to receive the email alerts, leave this value blank.
Second Selection	Select a second time to receive an email message containing the latest information about the events, reminders, key performance indicators, and report snapshots displayed in portlets on your Home page.

Field Name	Function
Third Selection	Select a third time to receive an email message containing the latest information about the events, reminders, key performance indicators, and report snapshots displayed in portlets on your Home page.
Include links in HTML Alerts	Check this box to include links to key performance indicators and reminders included in your alert email. When you click a link, a browser window opens where you can log in to NetSuite and view the report for that key performance indicator or reminder. You must also have the Email Using HTML box checked on the Transactions subtab of the Set preferences page to include links.
Respect Quick Date Portlet Settings	Check this box so that email alert results are based on the date specified in your Dashboard View filter. Clearing the box sends email alert results based on a different date.
E-Mail	Select an email address to which email alerts should be sent.
Send an On-Demand Alert from this Role	Check this box to enable on-demand alerts. On-demand alerts enable you to send email to **alerts@alerts.netsuite.com** or to reply to an alert email and receive an email from NetSuite with the contents of your dashboard to your login email address.
Click Here to send a test email message to <your email>.	Click the link to send a test message to the specified email address.

Note: When you remove an Activities, Reminders, Key Performance Indicators, or Report Snapshot portlet from your home page, alert emails no longer include information from the portlet you removed.

Receiving Email Alerts

On the Alerts subtab of the Set Preferences page, you can choose to receive two different types of email alerts:

- You can choose to receive a Daily Facts email alert up to three times a day. This standardized message summarizes the latest information in the Events, Reminders, Key Performance Indicators, and standard Report Snapshots portlets on your Home page, if these portlets are visible and not minimized on your dashboard. Note that these messages don't include data from custom and sales management report snapshots.

  Important: The Daily Facts email alert doesn't include contents from portlets that are minimized on your dashboard or not showing on your dashboard.

  You can also email **alerts@alerts.netsuite.com** from the email address you use to log in and automatically receive an email alert.
- You can choose to receive email updates when information in one or more of your most important saved searches changes.

To set up email alerts:

1. Go to Home > Set Preferences.
2. Click the **Alerts** subtab.

3. Choose the times of day you want to receive your three email alerts.

   If you don't want to receive any of these email alerts, change the value for the **First Selection** dropdown list to be blank.
4. Check the **Include Links in HTML Alerts** box to enable you to click links in email alerts and open your account to the relevant information.
5. Check the **Send an On-Demand Alert** from the **Role** box to enable you to send email to **alerts@alerts.netsuite.com** and automatically receive your email alerts.

   You must send email to this address from the email account you use to log in to NetSuite.
6. To receive email alerts when saved search data changes, select the record type that search is based on in the **Record Type** field.
7. In the **Search** field, select the name of the saved search.

   A search must have the **Available as Alert** box checked to appear in this list. Only Administrators can make searches available as alerts.

   For information about how to make saved searches available for alerts, see the help topic Enabling Saved Search Email Alerts.
8. Check the **Send on Update** box if you want to receive alerts both when new records are added and when current records are updated.
9. Check the **Show Recent Changes** box if you have enabled the Send on Update option and you want these alerts to include information about changes.
10. Click **Add/Edit**.
11. Repeat steps 6 – 9 to add up to five saved searches.
12. Click **Save**.

You will now receive email alerts at the times you set.

Personal Preferences for Telephony

In the Telephony subtab, you can set preferences such as telephony option, TAPI device, and other.

The Telephony subtab appears on the Set Preferences page only if you use the Telephony Integration feature.

To enable the feature an administrator must go to Setup > Company > Enable Features. On the SuiteCloud subtab, in the Integration Add-Ons section, check Telephony Integration, and click Save.

Go to Home > Set Preferences and click the Telephony subtab to set any of the preferences in the following table.

The following fields are available, based on the features in your NetSuite account, and the permissions associated with your NetSuite role.

Field Name	Function
Telephony Option	Select TAPI to use Telephony Integration with a TAPI-enabled phone or software for TAPI integration. Select CTI to use a NetSuite partner for integration: Contivio or Five9.
TAPI Device	Enter the name of the TAPI device you use to connect your phone to your computer.
CTI URL	Enter the URL for the CTI partner with whom you have an account.

Field Name	Function
	Note: For more information about setting up partner software to work with NetSuite, refer to the documentation from Contivio or Five9.
Prefix to Dial Out	Enter any numbers that should be dialed before the number in a phone number field. For example, you may need to dial 9 or 1 before you dial out of your phone system.

If you're using TAPI for telephony integration, follow the additional instructions listed on the Telephony subtab of the Set Preferences page to set up your phone and install the proper drivers.

For more information about using telephony integration, see the help topic Using Telephony Integration.

Personal Preferences for Restricting Views

Click the **Restrict View** subtab of the Set Preferences page to limit your access to information for the specific class, location, department, or subsidiary you select. The restrictions apply only for the duration of your current session. The next time you login, your original settings are restored.

Important: If you use NetSuite OneWorld, some reports don't support consolidation and can show results only for one subsidiary at a time. Before you can run one of these reports, you must set your user preferences to restrict your view to a single subsidiary.

Some standard reports return errors when you try to run them before setting this preference.

Field Name	Function
Subsidiary	(NetSuite OneWorld accounts only) Restrict your access to those records from the subsidiary you select. The restrictions apply to the user interface, searches, and reports for the duration of your current session.
Include Sub-Subsidiaries	(NetSuite OneWorld accounts only) Check this box to include records from child subsidiaries, in addition to the selected parent subsidiary for the current login session. When you select your root subsidiary above, you don't need to check this box. Records from all the sub-subsidiaries are available by default.
Department	Restrict your access to those records from the department you select. The restrictions apply to the user interface, searches, and reports for the duration of your current session. The next time you log in, your original settings will be restored.
Include Sub-Departments	Check this box to include records from sub-departments of the selected department for this session.
Include Unassigned	Check this box to include records that don't have a designated department in this session.
Location	Restrict your access to those records from the location you select. The restrictions apply to the user interface, searches, and reports for the duration of your current session. The next time you log in, your original settings will be restored.

Field Name	Function
Include Sub-Locations	Check this box to include records from sublocations of the selected location for this session.
Include Unassigned	Check this box to include records that don't have a designated location in this session.
Class	Restrict your access to those records from the class you select. The restrictions apply to the user interface, searches, and reports for the duration of your current session. The next time you log in, your original settings will be restored.
Include Sub-Classes	Check this box to include records from sub-classes of the selected class for this session.
Include Unassigned	Check this box to include records that don't have a designated class in this session.

For more information, see the help topics Inactivating Roles and Restrict Your Subsidiary View.

Using SuiteAnalytics Workbook

SuiteAnalytics Workbook is an analytical tool available in NetSuite. With Workbook, you can create and fully customize workbooks that combine datasets, tables, pivot tables, and charts using a single tool that leverages the new analytics data source.

By default, the SuiteAnalytics Workbook feature is enabled in all NetSuite accounts. If you can't find the Analytics tab in the NetSuite navigation menu, contact a user with the Administrator role.

See the following sections for information about workbooks and datasets, and workbook and dataset templates:

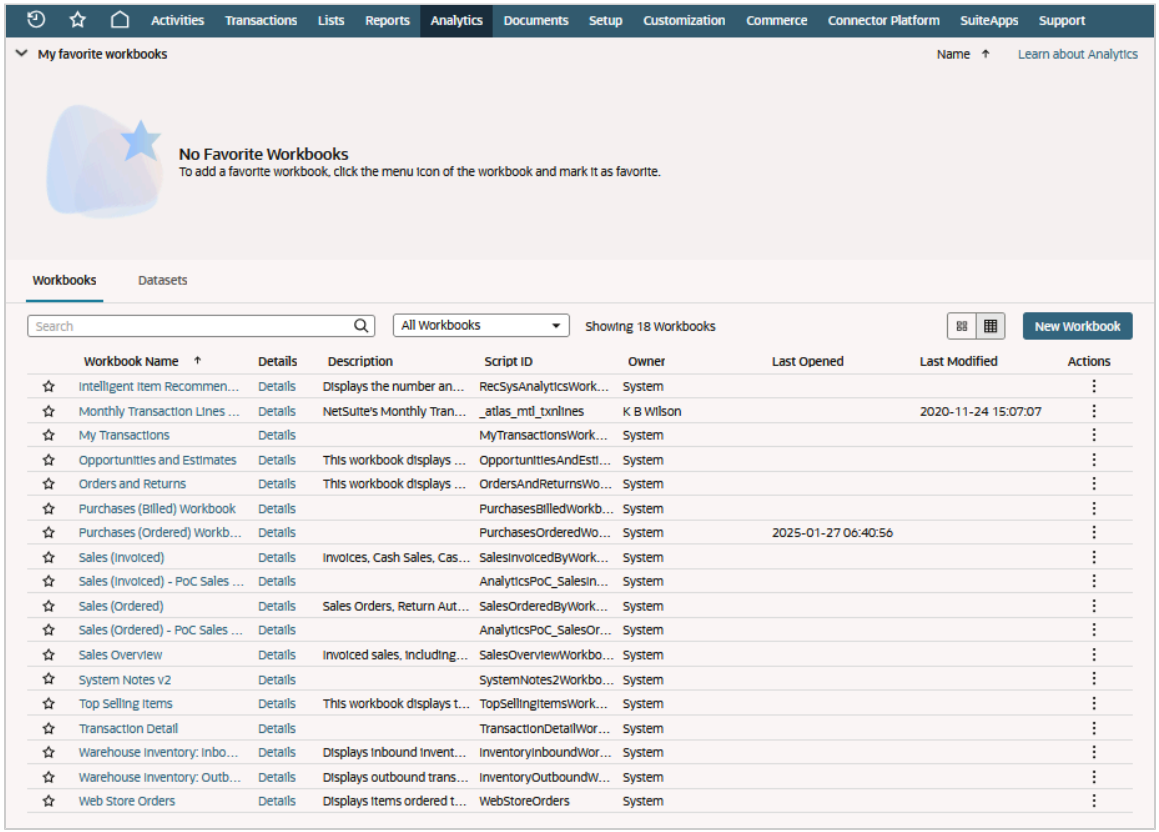
- Workbooks and Datasets
  - Sharing Workbooks and Datasets
  - Workbook and Dataset Templates

Navigation

Watch the following help video for information about navigating the SuiteAnalytics Workbook user interface:

Navigating Workbooks

To access SuiteAnalytics Workbook, click the Analytics tab in NetSuite. The Workbook user interface includes the Analytics Home page, the Dataset Builder, and three workbook visualization tabs: table, pivot, and chart.



Analytics Home page	The Analytics Home page includes Workbook and Dataset subtabs. From the home page, you can open and view any workbooks or datasets you have access to. For more information, see the help topic Analytics Home Page.
Dataset Builder	The Dataset Builder appears after you create a new dataset or open an existing dataset. Use the Dataset Builder to combine record types, fields, and criteria filters to create queries. For more information, see the help topic Dataset Builder.
Table tab	Within a workbook, you can use tables to explore your dataset query results without changing the source data of any associated workbook visualizations and without having to set a layout. For more information, see the help topic Table Tab.
Pivot tab	To pivot your dataset query results, use the Pivot tab. For more information, see the help topic Pivot Tab.
Chart tab	With workbook charts, you can create graphical representations of your dataset query results. For more information, see the help topic Chart Tab.

Workbooks and Datasets

In SuiteAnalytics Workbook, you analyze your company data using datasets and workbooks. You can create datasets and workbooks and share them with anyone in your organization.

Datasets are the basis for all workbooks. In a dataset, you combine record type fields and criteria filters to create a query. The results of this query act as the source data for your workbook visualizations. You can use a single dataset in multiple workbooks and workbook visualizations. Changes you make to a dataset are automatically applied to workbook visualizations based on that dataset.

Workbooks let you analyze the results of your dataset queries using different visualizations, such as tables, pivot tables, and charts. You can base a new workbook visualization either on a new custom dataset, or on any of the existing datasets that you have access to. You can also link two datasets in a single visualization to compare their metrics. For more information, see the help topic Dataset Linking in SuiteAnalytics Workbook.

The record types and fields you see in each workbook and dataset are based on the features enabled in your account and the permissions assigned to the role you use to log in to NetSuite. If you don't see a specific record type or field in a workbook that you need to access, contact a user with the Administrator role.

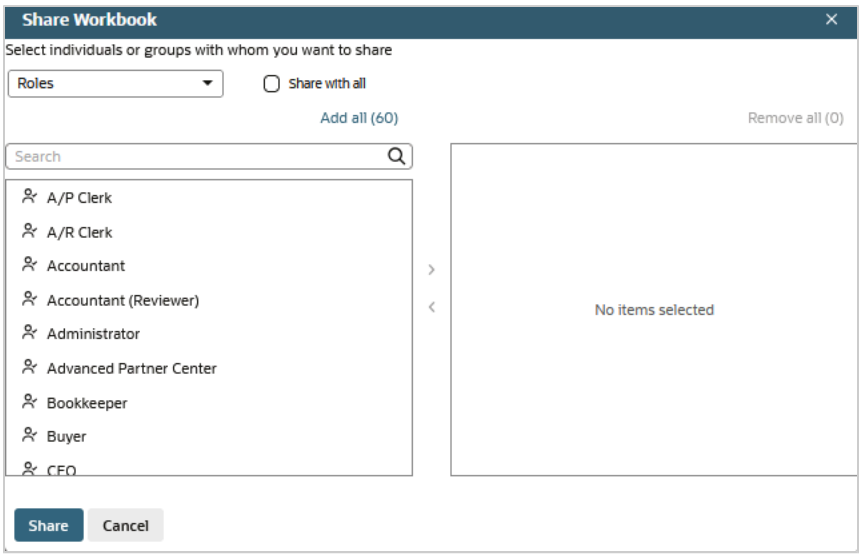
There are also predefined datasets and workbooks that you can edit and share if you have the Analytics Administrator permission. For more information, see the help topic The Analytics Administrator Permission.

Sharing Workbooks and Datasets

Anyone with access to SuiteAnalytics Workbook can share a workbook or a dataset with individual users or groups of users based on their assigned roles. However, to prevent data discrepancies, the recipients of a shared workbook can't edit the associated datasets. For example, if you share a workbook with users who have the Accountant role, they can access and save their own versions of the workbook or connected datasets, but they can't edit the original workbook or dataset that you shared.

To save and share a workbook or dataset:

1. Click **Share** from anywhere within the workbook or dataset.
2. Select the roles or users you want to share the workbook or dataset with, then click the right arrow to add them to the distribution list.



3. Click **Share**.

For more information, see the help topic Accessing and Sharing Workbooks and Datasets.

Workbook and Dataset Templates

There are over 20 predefined workbook and dataset templates in SuiteAnalytics Workbook. You can see the templates and datasets you have access to on the Analytics Home page.

In a dataset template, all required fields, record types and criteria filters are predefined so you can create a workbook without building a custom dataset first.

Workbook templates include predefined workbook visualizations such as table views, pivot tables and charts, so that you can analyze and visualize the results of the accompanying dataset templates.

Important: If you don't have the Analytics Administrator permission, you can only access these templates if someone with that permission shares them with you. If you don't see one of the listed templates in your account, contact the user with the Analytics Administrator permission.

If none of the predefined dataset templates and workbooks suit your needs, you can create your own dataset. For detailed steps, see the help topic Custom Workbooks and Datasets.

Working with Records, Transactions, and Lists

All the information you need to keep your business running smoothly is organized and stored in records in NetSuite. You can access these records from list pages that show all records of a certain type. You can customize these lists to display various fields from each record type.

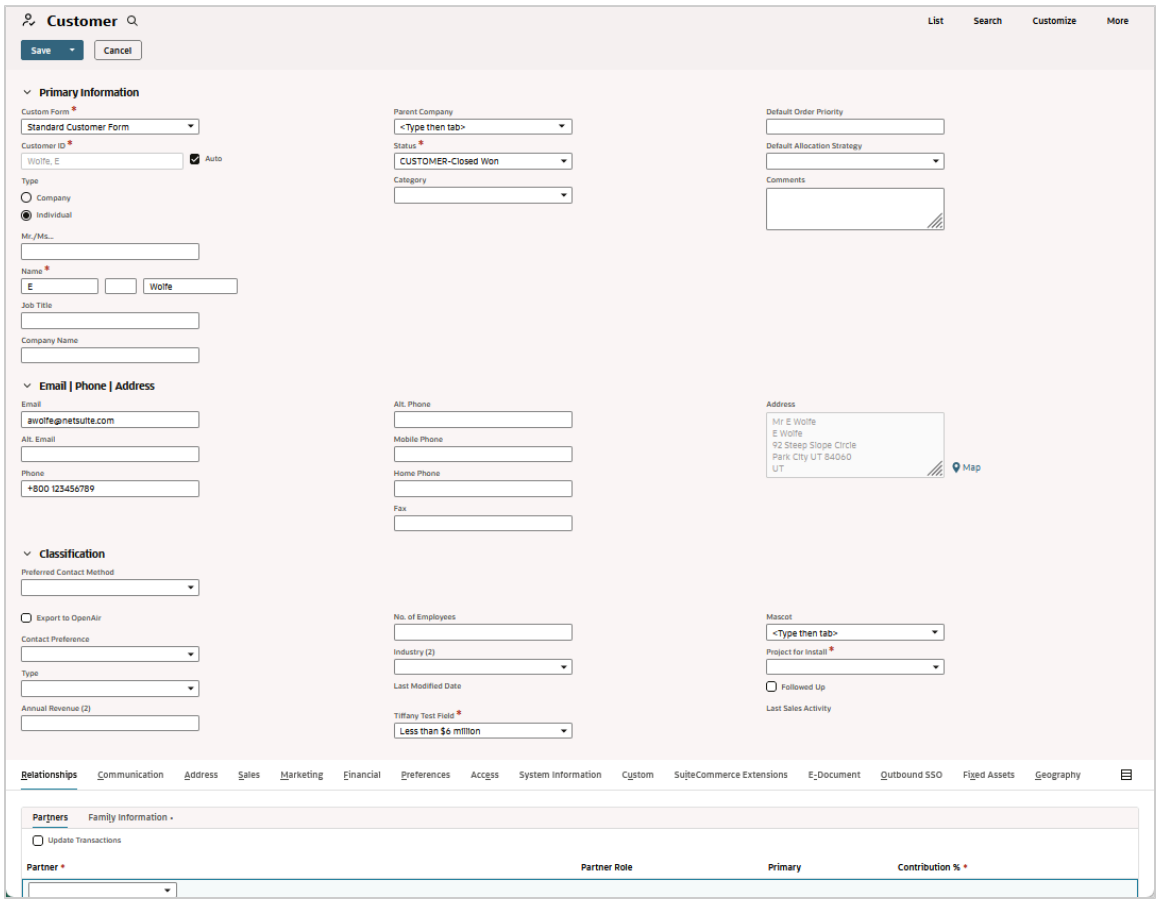
This section covers general information about working with records and lists. Transactions, which are records of financial exchanges, are also included in this section. Instructions for using specific types of records are included in the help for the functional area. To learn how the help for functional area is organized, see NetSuite Documentation Overview. This section is divided into the following subsections:

- Working with Records
- Duplicate Record Detection
- Working with Groups
- Working with Transactions
- Working with Lists

Working with Records

Through records, you keep track of all the information from your NetSuite account. You can have records of your employees, customers, vendors, items, web sites, updates, activities and so on. There are standard records provided in NetSuite for many business purposes, such as Accounts, Items, Shipping Items, Marketing Campaigns and so on. You can also create custom record types.

For example, you create a new customer record to track address, phone and email information. Then you link customer records with contact records to keep track of the individuals you do business with. You also create records for each of your financial accounts, any items you may sell, marketing campaigns, customer support cases, phone calls, events, and so on. Any information that you use to conduct business is tracked in NetSuite on a record.



For information about creating records in NetSuite, use the help topics for the specific record type. For more information, see NetSuite Record Types.

NetSuite uses transactions to record business events. Some transactions post to the general ledger while other transactions are non-posting. For more information about Transactions, see Working with Transactions.

After you create records in NetSuite, you can look at account registers, track customer activity, and receive reminders for upcoming events and phone calls. For more information about filling in the fields on a record page, see NetSuite Record Pages.

In NetSuite, you can also use customization tools to create your own record types. For more information, see the help topic Customization Overview.

Roles and Permissions

The types of records you can view, create, and edit vary according to the roles and permissions assigned to you. Administrators decide which records people in their organization can see and what they can do with them. For example, you might only have edit permissions for a certain record type, so you can update the record but can't delete it or create a new one. Few users have permissions to view or edit all of the record types in NetSuite. For more information, see the help topic NetSuite Permissions Overview.

Groups

You can create groups of records to communicate with a set of individuals within your organization or other companies you do business with. For example, you can invite a group of employees to a meeting

or send a marketing email blast to a group of customers. With NetSuite, you can create a dynamic group that changes based on record search results, or you can create a static group using a set of records that you select. For more information, see Working with Groups.

Lists

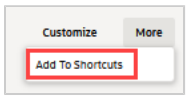
Lists enable you to access existing records in NetSuite. They include controls for working with the whole list and for working with individual records. For more information, see Working with Lists.

Creating a Shortcut to a Record

You can add any record to your shortcuts. Shortcut links appear under the star menu available on every NetSuite page and in the Shortcuts portlet. If the Shortcuts portlet isn't on your dashboard yet, you might be able to add it. For instructions, see the help topic Adding a Portlet to a Dashboard.

To add a shortcut from the page where you want the shortcut to go:

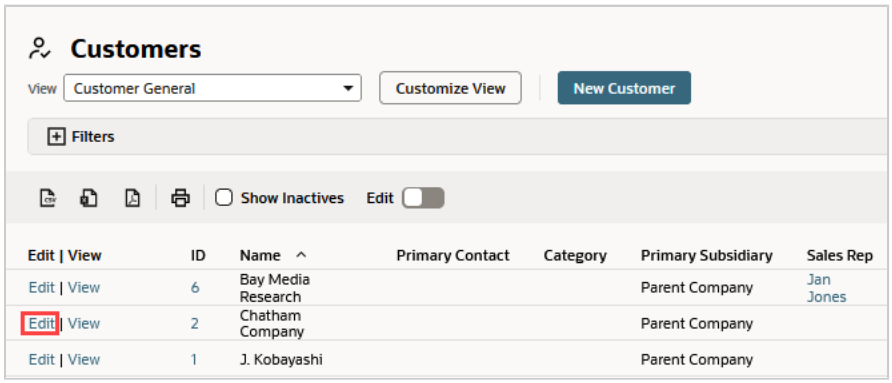
1. On the page's **More** menu, click **Add To Shortcuts**.



2. Edit name for the shortcut link. By default, it's the name of the page.
3. If you want the linked page to open in a new window, check the **Open in New Window** box.
4. Click **Save**.

NetSuite Record Pages

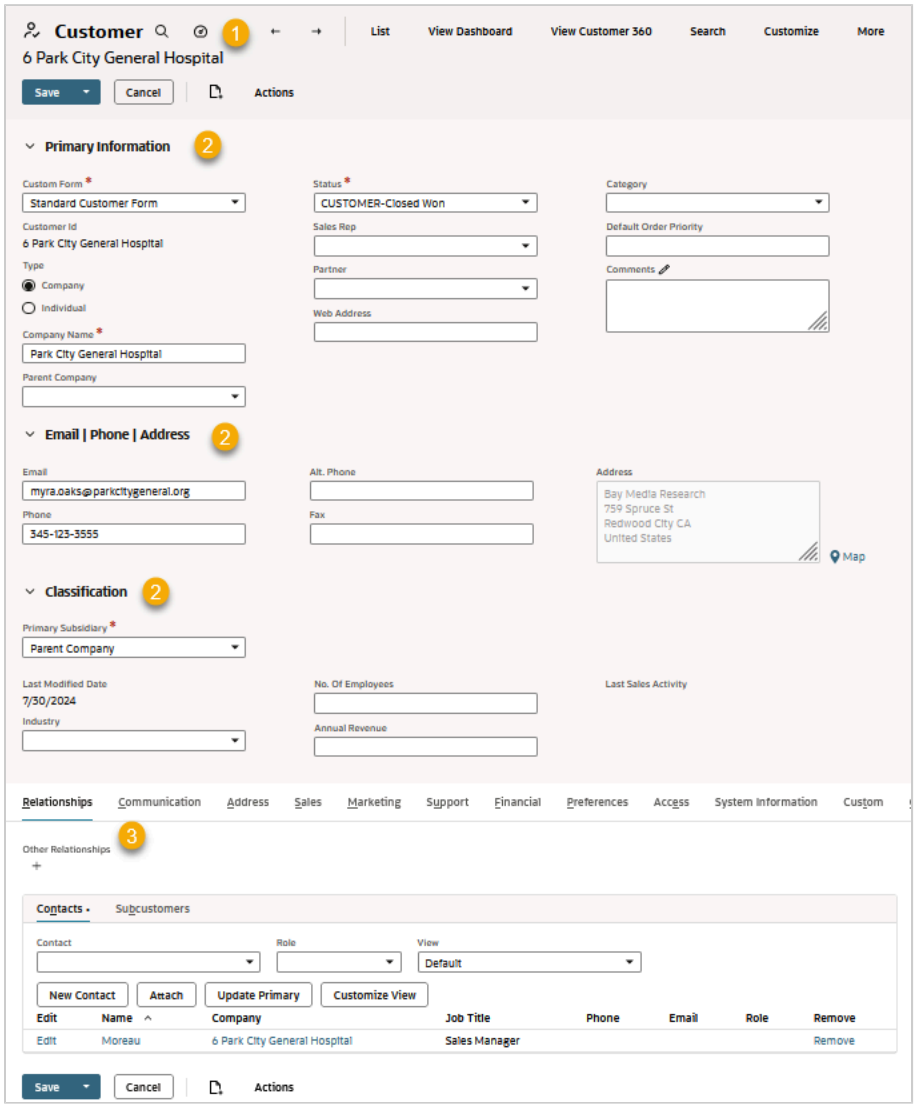
Each NetSuite record is represented as a page in the user interface. To enter a record page, go to the Lists tab and select the relevant record type. Click **Edit**.



Basic data appears in fields in the upper part of the page (the record form), and more detailed data (including data from related records) is displayed in lists and fields on subtabs in the lower part of the page. The fields in the form are often grouped to keep similar or related fields together.

For information about creating records in NetSuite, use the help topics for the specific record type. For links to these topics, see NetSuite Record Types.

The following screenshot shows a sample customer record in edit mode. The asterisks indicate that the field is required. The areas of the page are identified by number:



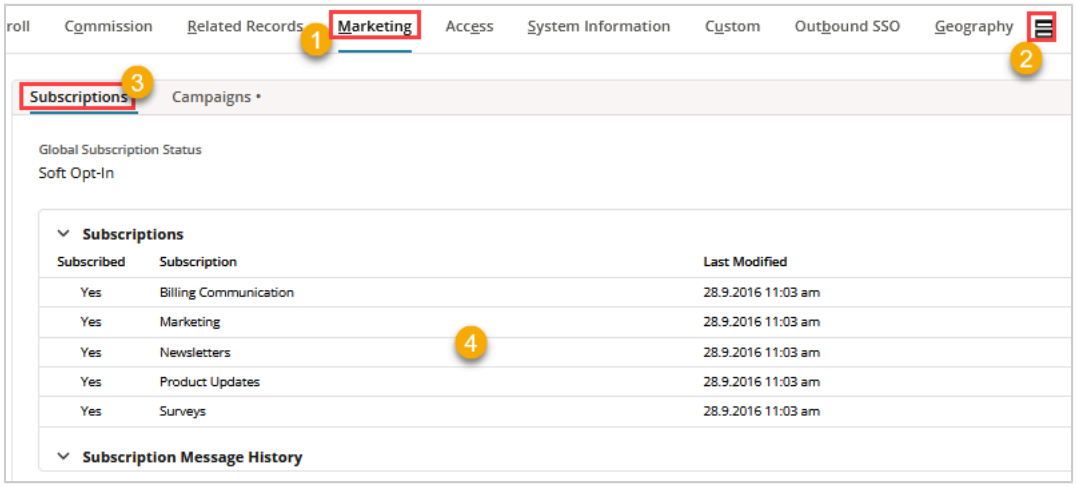
1	The record type (Customer in this example) and ID appear at the top with buttons and links that enable you to act on the record and go to other records.
2	Horizontal bars divide the fields into related groups.
3	Subtabs divide the record data further. For more information, see Record Subtabs.

For technical information about the fields in a record, such as the data type or maximum field length, you can use the SuiteScript Record Browser. For more information, see the help topic Working with the SuiteScript Records Browser.

Record Subtabs

Subtabs on records enable you to enter additional information. They appear at the bottom of the record page and are called subtabs to distinguish them from the tabs at the top of the page. Subtabs may contain fields, other subtabs, sublists, and a combination of these elements. Which subtabs are included depends on the record type. For links to help topics for specific record types, see NetSuite Record Types.

Here is an example of a subtab. It's the Marketing subtab on a customer record. This subtab includes fields at the top and its own subtabs at the bottom. The selected Item Orders subtab contains a sublist, only a portion of which is shown here.



1	**Primary subtab** – The bold font and pointer below the label indicate that this subtab is selected. This is the **Marketing** subtab. Some subtabs appear on most NetSuite records: ▪ **Communication** – This subtab messages and files to the record. For more information, see Attaching Files to Records and Entering Communication Information to a Transaction. ▪ **Related Records** – This subtab lists records and transactions that are related to the current record and includes links to these related records. It often includes secondary subtabs to categorize the related records. ▪ **System Information** – This subtab includes a System Notes subtab that enables you to view details about changes to the record.
2	**Expand Tabs button** – When you click this button, the subtabs expand and are stacked vertically on the page. The header for each subtab includes a button to return the subtabs to their original tabular layout. This rollup button appears only when your pointer is in the header area.
3	**Secondary subtab** – The bold font and pointer below the label indicate that this subtab is selected. The dot to the right of a secondary subtab indicates that information is included in the subtab.
4	**Sublist** – Sublists contain references to other records. Each record in the list is referred to as a line item. Sublists often include links to the record that is referred to. You can see an example in the Item column of this sublist. Some sublists can be edited. These sublists include buttons for working with each row of the list. For more information, see Buttons and Menus in NetSuite.

Record and Transaction Data Fields

Enter data on record and transaction forms using fields, boxes, and buttons. Some fields require a particular type of entry like a date or currency.

> **Note:** If you're not sure which fields to include when building a report, you can use the SuiteAnalytics Connect Browser to view table summaries and domain diagrams for the most widely used domains. For more information, see the help topic Working with the Connect Browser.

Text Fields

Text fields can have only letters, numbers, and basic punctuation. You can't enter any special characters or HTML codes in text fields.

Date Fields

Click the calendar icon next to a date field to open a popup calendar in which you can click the date. If you know the date format your company uses, you can type the date in the field. For tips, see Keyboard Shortcuts.

Amount Fields

Amount fields let you add, subtract, multiply, or divide—you don't have to calculate the value before you enter it in the field. For example, John Wolfe of Wolfe Electronics wants to write a check for automobile expenses. The business spent $87.45 on gas for one catering van, and $125.36 on gas for another van. If John wants to add these expenses together in the same check, he can compute the total in the Amount field.

To compute amounts:

1. In the **Amount** field, type **=** (equal sign).
2. After the equal sign, enter numbers and the computation symbols.

   For example, type **=125.36+87.45**

   To separate actions, use parenthesis, for example, **=(10+10)*2**.
3. Click another field on the page, or press Enter, to complete the calculation.

   The result appears in the **Amount** field.

   The results for the examples in step 2 appear as 212.81 and 40.00.

For more information, see Currency Field Limitations.

NetSuite Record Types

NetSuite includes record types for all areas of your business. Click the links below to learn more about each record type and how to create new records:

- **Accounting** – See the help topic NetSuite Accounting Overview.
- **Items** – See the help topic Creating Item Records.
- **Shipping Items** – See the help topic Creating Shipping Items.

  If you use the Shipping Label Integration feature, see the help topic Shipping Integration with FedEx, UPS, and USPS/Endicia.
- **Gift Certificates** – See the help topic Setting Preferences for Gift Certificate Authentication Codes
- **Employees** – See the help topic Adding an Employee.
- **Relationships** – You can create records for different types of business relationships:
  - **Leads** – See the help topic Lead Management.
  - **Prospects** – See the help topic Prospect Records.
  - **Customers** – See the help topic Customers.
  - **Projects** – See one of the following topics in the Help Center:
    - Creating a Basic Project Record
    - Creating a Project Record
  - **Contacts** – See the help topic Contacts.

  - **Groups** – See Working with Groups.

    Groups are a collection of contact, customer, employee, job, partner, or vendor records that you select. Using groups in NetSuite enables you to communicate efficiently with individuals and companies you do business with.
  - **Vendor** – See the help topic Creating a Vendor Record.
  - **Competitors** – See the help topic Competitors.
  - **Other Names** – See the help topic Other Name Records.
- **Commissions** – See the help topic Commissions.
- **Marketing** – See the help topic Marketing Automation Overview.
- **Support Management** – See the following topics in the Help Center:
  - Setting Up Case Management
  - Issue Management
  - Knowledge Base
- **Web Site** – See the following topics in the Help Center:
  - Site Builder Items, Forms, & Images
  - Site Builder Tabs & Categories
  - Setting Up Items for the Web Site
- **Search** – See the help topic Defining a Saved Search.
- **Mass Updates** – See the help topic Mass Updates.
- **Custom** – See the help topic Creating Custom Record Types.
- **Activities** – NetSuite enables you to create records to keep track of your business activities. See the following Help Center topics:
  - Scheduling Events
  - Creating CRM Task Records
  - Scheduling or Logging Phone Calls

Searching for Records

NetSuite includes several search tools to help you find and view your records. Here is a summary of the available tools with links to more information:

- **Global search** – A search field appears in the center of the NetSuite header so that it's accessible everywhere in NetSuite. You can enter keywords here to search your entire NetSuite account. See Global Search.
- **Search crosslink** – This link in the upper right of most record and lists pages opens a search page for the current record type. From this page you can search using the following methods:
  - **Simple search** – Use the filters on the page to search. See the help topic Defining a Simple Search.
  - **Advanced search** – Check the **Use Advanced Search** box to switch to advanced search mode. See the help topic Defining an Advanced Search)

    Saved search – Click **Create Saved Search** to open a page where you can define a search that you and others can run repeatedly for dynamically updated results. See the help topic Defining a Saved Search.
- **Quick find** – Many NetSuite pages include an icon (Quick Find) at the top of the page that you can click to search for other records of the same type. See the help topic Quick Find.

- **Dashboard search portlets** – Several portlets are designed to help you search for records. These are:
  - **Custom Search** – Displays the results from a saved search in a list. See the help topic Displaying Saved Search Results in Dashboard Portlets.
  - **Quick Search** – Contains a form where you can search for records of a selected type using a filter and keywords. See the help topic Quick Search Portlet.
  - **Search Form** – Similar to Quick Search, but the form is more complex and can be personalized. See the help topic Adding Personalized Search Forms to NetSuite Pages.

Viewing and Editing Records

After you create records in your NetSuite account, you can access those records to enter new information or edit information.

To create a new record, go to the NetSuite navigation menu that lists the record you want, and then click the New link next to the record type. For more information, see NetSuite Record Types.

Many types of records can also be created from the Create New menu. For more information, see Create New Menu.

Viewing Records

To view an existing record:

- Search for it by name or ID. See the help topic Quick Searches.

  When you do this, the record opens in view mode. In view mode, you can see all the information in the fields on the record but you can't change the data. Click Edit to add, delete, or edit information about the record.
- Go to the NetSuite navigation menu that lists the selected type of record and click the link for that type of record to open a list of the records. Then click the View link for the record.

  On the list page, you can sort the list of records and customize the list to display certain fields in the list view. For more information, see Working with Lists.

Editing Records

To edit a record, click Edit next to the record in a list. If inline editing is enabled, you can update multiple records from the list page. For more information, see Using Inline Editing.

Entering Subtab Data on Records

Subtabs on records enable you to enter additional information. For example, address information is often maintained on a subtab rather than in the main record form. Which subtabs are included depends on the record type. To learn more, use the help topics for the specific record type. For links to these topics, see NetSuite Record Types.

Some subtabs contain sublists of related records. These sublists include buttons to add, insert, copy, and remove records in the list. Sublists are common on transaction records. See Working with Transactions.

The Communication subtab, which is available for most record types, enables you to attach files to the record. For more information, see Attaching Files to Records.

Using the Rich Text Editor

A rich text editor is a tool that allows you to add content with additional formatting options in text fields on a record (for example under the Message subtab).

The editor has a header with a link you can click to enter an HTML source code. The header also includes font, paragraph, and other formatting options, which you can use to format the text you enter into the field.

To enable or disable the rich text editor and set default values to the tool, go to the Appearance subtab at Home > Set Preferences. For more information, see Personal Preferences for Appearance.

NetSuite uses the Oracle Rich Text Library (ORTL) based on a third-party library, the CKEditor. When using the ORTL, follow the syntax and usage guidelines included in the documentation on the CKEditor website.

Currency Field Limitations

When you work with currency fields in NetSuite, the fields might not calculate the correct value for large decimal numbers correctly. This is related to the limitations of floating-point numbers in computer science.

The maximum whole number that can be represented accurately is 9,007,199,254,740,991. However, for decimal numbers, when a number has 15 or more digits before the decimal point, rounding errors can occur. For example, 142,325,911,132,191.64 might be incorrectly rounded to 142,325,911,132,191.62.

With more digits before the decimal, the system may truncate the decimal part entirely, for example 14,232,591,113,219,174.64 might be rounded to 14,232,591,113,219,174.

Creating a Transaction from a Record

You can create transactions from lead, prospect, and customer records.

To create a transaction from a record:

1. View the record by clicking View next to a record in a list.
2. Click the menu on the record to open a list of records and transactions that you can create and link to the current record.
3. Select a transaction type. Some transactions types that are commonly available are sales order, invoice, and cash sale.

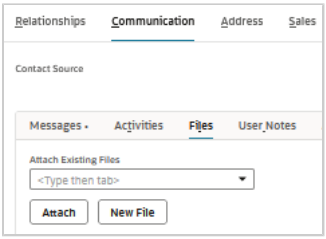
When you create a transaction from a record, the record is automatically linked to the transaction.

Attaching Files to Records

You can attach documents in the File Cabinet to records and transactions using the Communication subtab. This is useful if, for example, you want to keep a copy of a contract or license on a customer record. You don't need to edit the record to attach a file—you can do it from view mode.

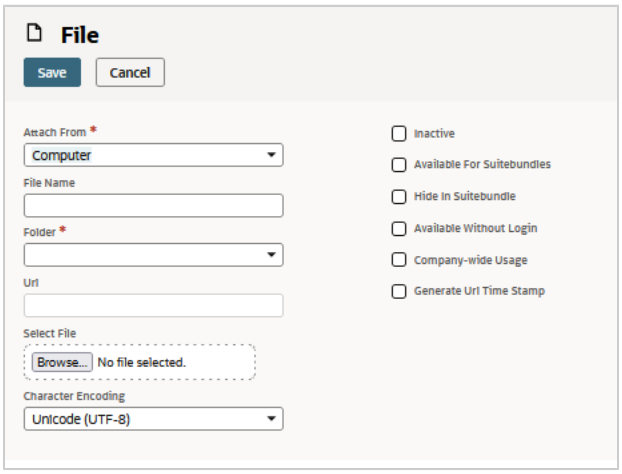
To attach a file to a record or transaction:

1. Click the **Communication** subtab on the record.
2. Click the **Files** subtab. The subtab looks like this:



Here you can attach a file that's already in the File Cabinet or add a new file to the File Cabinet and attach it.

- To attach a file that is already in the File Cabinet:
  1. Select a file from the **Attach Existing Files** list.
  2. Click **Attach**.
- To add a new file and attach it:
  1. Click **New File**.



  2. To add a file from your computer, select a File Cabinet destination from the **Folder** list. To create a new folder, click the plus sign next to the **Folder** field. A popup window Document Folder appears. Fill in the folder name and other optional information about the folder and click **Save**.
  3. Click **Browse** to open a popup window and select the file you want to add.
  4. Click **Save**. The file you selected is saved to the filing cabinet and attached to the record.

When anyone in your company opens the record, they can also view files associated with the record. Access to the File Cabinet folder is required to view a file from that folder when it's attached to a record

or transaction. For information about access to File Cabinet folders, see Restricting Access to File Cabinet Folders.

Important: You can't attach a file from the Attachments Sent or Attachments Received folder to records or transactions. You must move the file to another folder first. For more information, see Moving and Copying Files in the File Cabinet.

Inactivating Records

As your business grows, you may no longer need certain records in your NetSuite account. Rather than deleting a record you don't currently use, you can mark the record as inactive.

When you mark a record as inactive, the record remains in the system for future reference. However, the inactive record doesn't show on transactions for selection in lists.

Inactivating records is a quick and useful way to clean up your lists and keep your records up to date. When only current records are active, it's easier to find the right selection in lists on transactions because outdated choices don't show in the list. This makes form entry easier, accurate, and less prone to error.

You can make records inactive one at a time by checking the Inactive box on individual records. The Inactive box shows for users with the appropriate permission to change records.

You can also inactivate many records at one time by marking them on a list page, as described below.

To inactivate list records:

1. Check the **Show Inactives** box. The page automatically reloads to display the **Inactive** column.
2. In the **Inactive** column, check the boxes next to the records you want to inactivate.
3. Click **Submit**.

After a record is marked inactive, it no longer appears in dropdown lists or popup lists in NetSuite. You can see inactive records on list pages by checking the Show Inactives box.

Important: After you inactivate a record, it won't show on transactions for selection in lists. However, if the Search option shows in the dropdown list for a field, the search will return inactive records if the Inactive filter is set to Either or Yes. Inactive records in these search results can be added to transactions. To filter inactive records out of search results, be sure to set the Inactive filter to No in the search criteria.

Duplicate Record Detection

The Duplicate Detection & Merge feature helps you find duplicate records in your NetSuite account and use the information in them to create a single record.

An administrator can turn on the Duplicate Detection & Merge feature at Setup > Company > Enable Features (Administrator) on the Company subtab in the Data Management section. The administrator configures the types of records you detect duplicates of and also chooses which fields to consider when finding duplicates. For more information about the setup of this feature, see the help topic Setting Up Duplicate Detection.

Four types of records support duplicate matching:

- Customer

- Vendor
- Partner
- Contact

> **Note:** Private contacts are excluded from the Duplicate Detection process.

You must have full permissions to the entity types you're merging. For example:

- You must have full permissions for Vendors to merge two vendors.
- You must have full permissions for both Contacts and Customers to merge Individual Customers, which are composed of both.
- You must have full permissions for both Customers and Vendors to merge into a Customer/Vendor entity.

Duplicate Customers and Vendors can be detected across subsidiaries. The subsidiary a potential duplicate customer or vendor belongs to is shown in the Primary Subsidiary column. You must first enable the Detect Duplicates Across Subsidiaries feature at Setup > Company > Company Management > Duplicate Detection.

> **Note:** System notes aren't transferred from duplicate entity records to the primary entity record during a merge. Merging entities updates the system notes and last modified date for all transactions associated with the duplicate entity or entities. The system notes for these transactions will indicate that they were updated by the Duplicate Resolution process.

> **Warning:** Merging entities is a data-intensive operation, and complex merges of many records such as transactions, custom fields, or workflows may time out when processing. You should test the merge process in a sandbox account first to ensure that it can be completed.
>
> You should designate the entity with the most transactions as the primary entity and entities with fewer transactions as duplicates to reduce the time it takes to complete the merge. You should also avoid merging entities with large numbers of transactions whenever possible.

With this feature enabled, you get a notification before saving a record that might be a duplicate. Notification occurs in two ways:

- When you create a new record and enter matching data in fields the administrator set up as duplicate criteria, a warning appears at the top of the record with a link to the potential duplicates. If you've permission to view those records, you can click the link to resolve these matching records.
- When you add a record from a list by using Quick Add or use the Edit button to make changes to a record that would make it a duplicate, you receive a popup warning.

You can also go to Lists > Mass Update > Entity Duplicate Resolution to search for all possible duplicate records based on your criteria. With the duplicate resolution mass update, you can find and resolve large numbers of duplicate records in your NetSuite account in a single operation.

For more information about how to manage duplicate records, see Manage Record Duplicates Page.

For more information, see the following:

- Merging or Deleting Duplicate Records
- Merging Large Numbers of Records
- Merging Different Types of Records
- Words Excluded from Duplicate Detection Matching

Merging or Deleting Duplicate Records

When you find duplicate records in your NetSuite account, you can merge them, resulting in one complete record for each person or company you do business with.

The Administrator role is required to set up which types of records you detect duplicates for and how you determine that two records are duplicates. An administrator selects fields on records to check for matching information. When matches are found, the system identifies the records as possible duplicates. For example, the administrator may choose to identify duplicates based on matching email addresses. If the selected fields are blank, they don't match.

When you merge records, the records' transaction histories are also merged. The original data, such as entity name, is retained to preserve a transaction's history. Your administrator may have restricted the ability to perform merges to specific roles.

Note: System notes aren't transferred from duplicate entity records to the primary entity record during a merge. Merging entities updates the system notes and last modified date for all transactions associated with the duplicate entity or entities. The system notes for these transactions will indicate that they were updated by the Duplicate Resolution process.

Warning: Merging entities is a data-intensive operation, and complex merges of many records such as transactions, custom fields, or workflows may time out when processing. You should test the merge process in a sandbox account first to ensure that it can be completed.

You should designate the entity with the most transactions as the primary entity and entities with fewer transactions as duplicates to reduce the time it takes to complete the merge. You should also avoid merging entities with large numbers of transactions whenever possible.

You can merge duplicate entity records that have login access but have different email addresses only if an administrator has set the **Resolve Duplicates with Conflicting Login Access** preference to **By deleting the duplicates' access**. This setting deletes the login access of records you define as duplicates. When this preference is set to the default value of **Manually**, you must first manually remove the login access of one record before you merge. The person whose access is removed must use the login access defined on the primary record. Be sure to notify this person of the change because the deleted login will no longer work.

To prevent you from merging records that aren't duplicates, you can only merge records if they have the same tax registration numbers or if both records don't have tax registration numbers.

This section is divided into the following subsections:

- Manage Record Duplicates Page
- Submitting Merge Operations
- Merging Records with Active Workflow Instances
- Status and Timing of Merge Operations

Note: For NetSuite OneWorld accounts: you can only merge entities from different subsidiaries if they're the same type.

For more information administrators should see the help topic Setting Up Duplicate Detection.

Manage Record Duplicates Page

The Manage Duplicates page shows lists of records that NetSuite has identified as possible duplicates.

You can access this page in two ways:

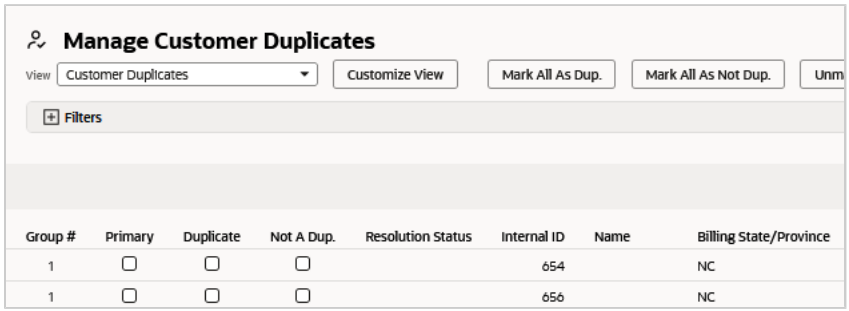
- The Manage Duplicates page opens when you click the link on a duplicate warning message. These warning messages appear when you open a record that has been identified as having potential duplicates or when you attempt to save a new record with information that matches an existing record.
- If you use the administrator role or have a role with the Mass Updates permission, you can access this page at Lists > Mass Update > Entity Duplicate Resolution. From here, you can search matching records and resolve many duplicates in a single operation. For more information, see the help topic Setting Up Duplicate Detection.

On the Manage Duplicates page, you specify which records are duplicates and which aren't. You can also specify a primary record for each set of possible duplicates. If the primary record and duplicate record have different information for the same field, the information from the primary record takes precedence and is preserved. The information in the duplicate records for these fields is lost.

In the Merge Type field at the top of the page, you select how to process the records in the list. For more information, see Submitting Merge Operations.

For duplicate searches of customer and contact records, some common words are excluded to prevent false matches. For a list of these words, see Words Excluded from Duplicate Detection Matching. Also note that in OneWorld accounts, records associated with different subsidiaries are never considered duplicates even if the information in those records matches.

In the following screenshot, you can see an example of the Manage Duplicates page. The list of records is filtered to show customers. You can change the Entities filter value to see duplicates of other types of records.



All potential duplicate records are grouped together on this page. These groups are assigned a number in the **Group #** column. For example, if you're searching for duplicates by phone number and have three records with the same phone number, all of these records have the same group number.

The **Fields** column shows how many fields on each record contain data. Duplicate records often have less information entered than primary records do.

You can customize the columns displayed on the Manage Customer Duplicates page by clicking **Customize View**. Creating a customized view can be helpful when the default view doesn't display columns for the fields you're most interested in. For example, if you're searching for duplicates based on the Email field, you may want to create a view called **My Duplicates** where the **Email** field is displayed as a column.

You can use the following buttons to quickly select and resolve duplicate records:

- Click **Mark All As Dup.** to check all the boxes in the **Duplicate** column. When you click **Merge Selected**, these records are processed according to the option you select in the **Merge Type** filter.
- Click **Mark All As Not Dup.** to check all the boxes in the **Not A Dup.** column. These records aren't merged.

- Click **Unmark All** to clear all the boxes.

Note: System notes aren't transferred from duplicate entity records to the primary entity record during a merge. Merging entities updates the system notes and last modified date for all transactions associated with the duplicate entity or entities. The system notes for these transactions indicate that they were updated by the Duplicate Resolution process.

Warning: Merging entities is a data-intensive operation, and complex merges of many records such as transactions, custom fields, or workflows may time out when processing. You should test the merge process in a sandbox account first to ensure that it can be completed.

You should designate the entity with the most transactions as the primary entity and entities with fewer transactions as duplicates to reduce the time it takes to complete the merge. You should also avoid merging entities with large numbers of transactions whenever possible.

Submitting Merge Operations

Note: You must have the full level of the Duplicate Entity Management permission to merge duplicates. By default, the Sales Person role has only view level. The Sales Manager and Administrator roles have full level.

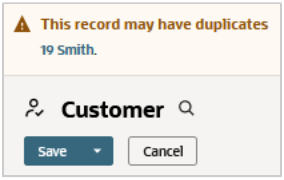
Note: System notes aren't transferred from duplicate entity records to the primary entity record during a merge. Merging entities updates the system notes and last modified date for all transactions associated with the duplicate entity or entities. The system notes for these transactions will indicate that they were updated by the Duplicate Resolution process.

Warning: Merging entities is a data-intensive operation, and complex merges of many records such as transactions, custom fields, or workflows may time out when processing. You should test the merge process in a sandbox account first to ensure that it can be completed.

You should designate the entity with the most transactions as the primary entity and entities with fewer transactions as duplicates to reduce the time it takes to complete the merge. You should also avoid merging entities with large numbers of transactions whenever possible.

To search for possible duplicates:

1. Click the notice in the duplicate record.



2. Expand the **Filters** area at the top of the list to display the filters.
3. In the **Entities** filter, select a type of record to view possible duplicates for that type.

   For example, select **Contacts** to view all contacts you've access to that have some of the same information as other contact records.

   Important: You can merge two records that both have login access only if those records have different login email addresses and passwords.

4. In the **Merge Type** field, select how you want to merge the selected records:

Option	Description
Mark all selected as not duplicates	This keeps all records without any changes.
Make duplicates subcustomers of primary	This option is available only for customer records. It makes the duplicate record a subcustomer of the primary customer record. For more information, see the help topic Creating a Subcustomer Record.
Merge duplicates into primary record	This merges all information from the duplicate records into empty fields in the primary record. If information is entered in the field on both the primary and the duplicate, the information about the primary record remains the same.
Merge duplicates into record created the earliest	This saves the record with the earliest date in the Created column and places information from selected duplicated records into any empty fields on the saved record.
Merge duplicates into record with most populated fields	This saves the record with the highest number in the Fields column and places information from selected duplicate records into any empty fields on the saved record.
Merge duplicates into record with most recent activity	This saves the record with the most recent date in the Last Activity column and places information from selected duplicate records into empty fields on the saved record.
Delete duplicates, keep primary record	This saves only the record you selected as the primary and deletes all records you selected as duplicates.
Delete duplicates, keep record created the earliest	This saves the record with the earliest date in the Created column and deletes all other selected records in this group.
Delete duplicates, keep record with most populated fields	This saves the records with the highest number in the Fields column and deletes all other selected records in that group.
Delete duplicates, keep record with most recent activity	This saves the record with the most recent date in the Last Activity column and deletes all other selected records in the group.
Make duplicates subrecords of primary	This saves the record you designate as the original, primary record and converts those you mark as duplicates into its subrecords.

5. For each group of records, check the box in the **Primary** column next to the record you want to designate as the main record. Information from duplicate records is merged into empty fields on the primary record.
6. Check the box in the **Duplicate** column next to any record that is for the same person as the primary record. Information from these records is merged into the primary record.

   You can also click **Mark All As Dup.** to check all boxes in the Duplicate column.
7. Check the box in the **Not A Duplicate** column next to any record that isn't for the same person as the primary record. These records remain unchanged.

   You can also click **Mark All as Not Dup.** to check all boxes in the **Not a Dup** column.
8. Click **Submit Selected** to complete the action you selected in the **Merge Type** field.

Merging Records with Active Workflow Instances

When you merge records, the records may have active workflow instances running on them. In this case, NetSuite keeps the workflow instance running on the record that you choose to keep and cancels any other workflow instance.

For example, you merge duplicate customer records that each have an active workflow instance named Process Customer running. Depending on the options you choose in the Merge Type list on the manage

duplicates page, NetSuite keeps one of the records, merges the other entity fields with that record, and cancels any workflow instances on the duplicates. In this example, only one instance of the Process Customer workflow will run on the record after the merge operation.

Note: System notes aren't transferred from duplicate entity records to the primary entity record during a merge. Merging entities updates the system notes and last modified date for all transactions associated with the duplicate entity or entities. The system notes for these transactions will indicate that they were updated by the Duplicate Resolution process.

Warning: Merging entities is a data-intensive operation, and complex merges of many records such as transactions, custom fields, or workflows may time out when processing. You should test the merge process in a sandbox account first to ensure that it can be completed.

You should designate the entity with the most transactions as the primary record and entities with fewer transactions as duplicates to reduce the time it takes to complete the merge. You should also avoid merging entities with large numbers of transactions whenever possible.

For more information about the types of merges that you can perform, see Submitting Merge Operations.

Status and Timing of Merge Operations

When you submit a duplicate merge operation, it's placed in a queue and is executed when operations ahead of it in the queue are completed. Go to Lists > Mass Update > Duplicate Resolution Status to view the Duplicate Resolution Status page. Here you can view the status of duplicate merge operations, the number of records merged, and the number of records that could not be merged. You can view possible errors that occur during the operation by clicking the Details link in the Errors column.

After you submit a duplicate merge operation, you can keep working in NetSuite without waiting for the merge operation to finish. You can't edit records you've marked as duplicates during the time that the duplicate operation is queued or running. The primary record is locked only for a brief time when the merge starts.

Note: System notes aren't transferred from duplicate entity records to the primary entity record during a merge. Merging entities updates the system notes and last modified date for all transactions associated with the duplicate entity or entities. The system notes for these transactions will indicate that they were updated by the Duplicate Resolution process.

Warning: Merging entities is a data-intensive operation, and complex merges of many records such as transactions, custom fields, or workflows may time out when processing. You should test the merge process in a sandbox account first to ensure that it can be completed.

You should designate the entity with the most transactions as the primary record and entities with fewer transactions as duplicates to reduce the time it takes to complete the merge. You should also avoid merging entities with large numbers of transactions whenever possible.

Historical log records for duplicate merge tasks are saved in NetSuite for only seven days before the information is permanently erased.

Merging Large Numbers of Records

NetSuite can merge an unlimited number of records using the Mass Update functionality. Administrators set the rules for the merge process to determine which record in a set of duplicates is the primary record and configure the criteria to control the search results.

Note: System notes aren't transferred from duplicate entity records to the primary entity record during a merge. Merging entities updates the system notes and last modified date for all transactions associated with the duplicate entity or entities. The system notes for these transactions will indicate that they were updated by the Duplicate Resolution process.

Warning: Merging entities is a data-intensive operation, and complex merges of many records such as transactions, custom fields, or workflows may time out when processing. You should test the merge process in a sandbox account first to ensure that it can be completed.

You should designate the entity with the most transactions as the primary record and entities with fewer transactions as duplicates to reduce the time it takes to complete the merge. You should also avoid merging entities with large numbers of transactions whenever possible.

To merge large numbers of duplicate records:

1. Go to Lists > Mass Update > Mass Updates.
2. In the **Action** column, expand the **Duplicate Resolution** options, and click the type of record you want to merge.
3. Use the dropdown list in the **Primary Selection Mode** field to define the primary record. You can use the following modes:
   - **Created earliest** – This mode selects the record that was created first as the primary record.
   - **Most populated fields** – This mode selects the record that has the most fields containing data as the primary record.
   - **Most recent activity** – This mode selects the record with the most recent activity as the primary record.
4. Use the **Record Selection Mode** list to define which records are selected. You can use the following modes:
   - **All from duplicate group** – Both the primary record and the duplicate records are selected from the complete group of duplicate records, and search results are used only to determine the groups.
   - **Master from duplicate group** – The primary record is selected from the whole group, and duplicates are selected from the search results only.
   - **Master and duplicates from search only** – Both the primary record and the duplicate records are selected only from the search results.

You can use various criteria to define which records are included in the operation and schedule regular duplicate merge operations to run automatically at regular intervals.

You may get a Merge Time Out Error. For information about how to resolve it, see Resolving Duplicate Merge Time Out Errors.

Resolving Duplicate Merge Time Out Errors

A Merge Time Out Error occurs when the system can't complete a merge due to the amount of information being merged or remapping required.

Follow these steps to troubleshoot and resolve merge time out errors when merging large numbers of records in NetSuite.

Required Permissions:

- You must have the **Merge Prolong Timeout** permission.

  If you don't have this permission, contact your NetSuite administrator to assign it at **Setup > Users/ Roles > Manage Roles > Permissions > Lists.**
- You must have full permissions to the records you want to merge.

Note: The troubleshooting steps below must be performed manually.

To resolve a merge time out error:

1. **Review the error log:**

   Go to **Lists > Mass Update > Duplicate Resolution Status** to review details about the error.
2. **Restart the merge process:**

   Go to **Lists > Relationships > Customers**, then from the customers list select one of the duplicate records you've identified and click the edit button.
3. Next, click on the merge button to open the duplicate merge form.
4. **Choose the primary record:**

   Under primary, select the entity record you want the duplicates to be merged into.
5. Next, check the **Prolong Timeout** box to extend the time allowed for the merge operation.
6. Click the merge button to re-run the merge.

   You should run merges during off-peak hours when system activity is low, as the merge process locks certain system resources.

Merging Different Types of Records

Sometimes duplicate records exist between record types, such as a vendor record and a partner record for the same person or company. The Duplicate Detection feature only searches for possible matches within the same record type, but if you know of duplicated between two record types, you can merge them manually.

Note: System notes aren't transferred from duplicate entity records to the primary entity record during a merge. Merging entities updates the system notes and last modified date for all transactions associated with the duplicate entity or entities. The system notes for these transactions will indicate that they were updated by the Duplicate Resolution process.

Warning: Merging entities is a data-intensive operation, and complex merges of many records such as transactions, custom fields, or workflows may time out when processing. You should test the merge process in a sandbox account first to ensure that it can be completed.

You should designate the entity with the most transactions as the primary record and entities with fewer transactions as duplicates to reduce the time it takes to complete the merge. You should also avoid merging entities with large numbers of transactions whenever possible.

You can merge records between the following record types:

- Partners
- Vendors
- Customers

Merging Customer/Vendor Entities in Different Subsidiaries

You can merge Customer/Vendor entities across subsidiaries, creating a single multi-subsidiary Customer/Vendor entity. Merging two entities from different subsidiaries results in the following:

- The primary subsidiary becomes the Primary Entity subsidiary.
- The Duplicate Entity subsidiary becomes a secondary subsidiary for each entity.
- The Contact from the primary subsidiary is linked and synchronized with the primary entity.

To merge records of different types:

1. Open the duplicate record you want to merge into a primary record in edit mode. Don't make any changes to the record.
2. Click **Merge**. This opens a new page.
3. In the **Primary** field, select the name of the customer, partner, or vendor record into which the record should be merged.

   The record selected in the Primary field becomes the primary record.
4. A summary of the files to be merged will appear in the **Duplicate/Master Summary**.
5. Click **Save**.

The merged record opens. All activities, transactions, messages, files, cases, contacts, and other subtab lists are combined on the merged record. Any fields that were blank on the primary record get filled in from the duplicate, but existing data isn't replaced.

> **Note:** Administrators can restrict the ability of users to merge records. For more information about how to limit the merge function by role, see the help topic Duplicate Entity Management Permission.

Near Match Detection

The Near Match Detection feature helps identify duplicate entities in the database, such as customers and vendors. This feature is available in accounts which use Latin or Cyrillic characters.

In NetSuite, standard duplicate detection relies on exact matches of names and other criteria which you set in the Set Up Duplicate Detection page. The system alerts you of potential duplicates if two or more entities have the same information. For example, if two entities share the same name, NetSuite alerts you of a potential duplicate record.

The Near Match Detection feature identifies duplicates based on similar but not exact match criteria. This enhancement improves duplicate detection by catching duplicates created from misspellings, typos, and other minor variations in data.

> **Note:** Near Match Detection only identifies duplicates when creating new entity records in the NetSuite UI. To detect duplicates within your existing records, you can go to Lists > Mass Update > Entity Duplicate Resolution to search for all possible duplicate records based on your criteria. With the duplicate resolution mass update, you can find and resolve large numbers of duplicate records in your NetSuite account in a single operation.

To set up Near Match Detection

1. Administrators can go to Setup > Company > (Company Management) Duplicate Detection (Administrator) and check the **Near Match Detection** box. The feature can be disabled at any time to revert to the exact match detection method.

2. Set which entities and which fields to look for duplicates in. If you set multiple fields for an entity, Near Match Detection will consider all of them when looking for duplicates.

   For example, if you set duplicate detection to look for customers and use the Name and Email fields to match on, duplicate detection will only look for customers that have similar names AND email addresses.
3. If you want to detect duplicate entities across all of your subsidiaries, check the **Detect Duplicates Across Subsidiaries (Customers and Vendors Only)** box.

   When this box is checked, Near Match Detection will check for duplicates even across subsidiaries that the user doesn't have access to.

Near Match Detection will start comparing data in your selected entity fields after you've entered three characters. More characters will help it better identify duplicates.

When potential duplicates have been detected, a notification banner highlighting records that could be merged into one entity record will appear.

For more information, see the help topics Duplicate Detection Preferences and Duplicate Record Detection.

Words Excluded from Duplicate Detection Matching

Records are listed as duplicates when they have either matching or similar information. When searching for similar information, NetSuite excludes certain words or phrases that occur often in fields to avoid false duplicates. This list is organized by field name.

Customer, Partner, and Vendor Name

The following words or abbreviations aren't considered when searching for similar information to prevent false matches in the company or customer name field:

- Corp.
- Corporation
- Co.
- Company
- Inc.
- Incorporated
- Enterprise(s)
- Firm

Note that duplication detection also ignores variations of these terms, such as abbreviations without periods at the end.

Email Address

If you identify duplicates based on matching email address, you can set duplicate criteria on **Email (full)** to identify duplicates only if the full email addresses of two records match exactly.

If you set duplicate criteria based on **Email (domain only)**, the domain names listed below aren't considered when searching for similar information to prevent false matches for email addresses. Administrators can add or remove a domain from the default list in the Excluded Domains subtab on the Set Up Duplicate Detection page at Setup > Company > Company Management > Duplicate Detection. Administrators can also configure a unique list of domains to be excluded from Email (domain only).

- adelphia.net
- altavista.com
- ameritech.net
- aol.com
- attbi.net
- att.net
- bellsouth.net
- bigfoot.com
- comcast.net
- cox.net
- earthlink.com
- excite.com
- gmail.com
- home.com
- hotmail.com
- ix.netcom.com
- juno.com
- lycos.com
- mindspring.com
- msn.com
- netscape.net
- netzero.com
- pacbell.net
- prodigy.net
- qwest.net
- sbcglobal.net
- swbell.net
- sympatico.ca
- verizon.net
- worldnet.att.net
- yahoo.com
- yahoo.co.uk

Note: Potential duplicate results are determined differently when using the email address from a customer record than from a contact record. Customer records are flagged as potential duplicates when the domain name portion of the address matches, provided the domain name isn't listed on the Excluded Domains list. Contact records are flagged as duplicates only if the entire email address matches. This difference prevents false potential duplicate results when multiple contact records from one company use the same domain name in their email addresses.

Phone Number

When searching the phone number field for duplicates, all prefixes and extensions are excluded so that only the 9 digit or 6 digit numbers are considered. If you compare two matching phone numbers, but one has an area code and the other doesn't, they won't be detected as duplicates.

Address

Addresses are considered potential duplicates based on the street number and name. Similar numbers with a street name match are considered potential duplicates, for example.

The following words or symbols aren't considered when searching for potential duplicates in the Address field:

- Street/St.
- Avenue/Ave.
- Court/Ct.
- Suite/Ste.
- Apartment/Apt.
- #
- Lane/Ln.
- Highway/Hwy.
- Road/Rd.
- West/W.
- North/N.
- East/E.
- South/S.
- NW
- SW
- SE

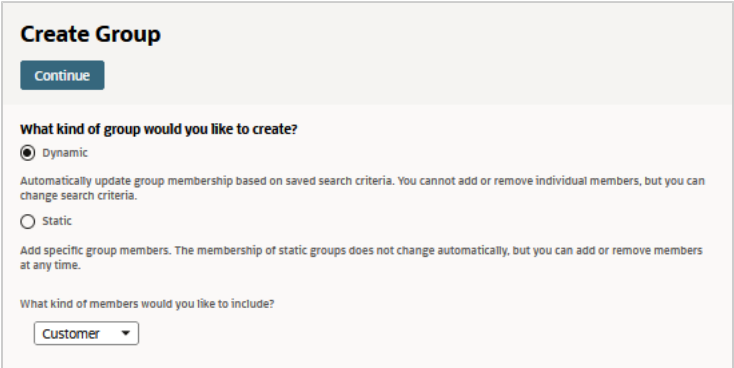
Working with Groups

A group is a set of employees, contacts, customers, partners or vendors. You can create groups of records to communicate with a set of individuals. For example, invite a group to a meeting, or create folders in the File Cabinet for a specific group in your organization.

With groups you can do the following:

- Invite everyone in a group to the same event.
- Use the shared calendar to see when the group meets or has other scheduled events.
- Create folders in the File Cabinet that only group members can view.
- Assign cases, leads, and support or sales territories to groups if the Support Group or Sales Group box is checked on the group record.
- If you use the Marketing Automation feature, you can select customer, lead and prospect groups as target groups for marketing campaigns. You also send email, mail or faxes in bulk to a group using the Mail Merge feature. You can divide groups into marketing test cells that enable you to test different versions of a marketing template.
- If you use the Team Selling feature, you can create sales teams. For more information, see the help topic Setting Up a Sales Team.

You can create groups by choosing members individually or by using a search of records. To create a group, go to Lists > Relationships > Groups > New.



You can create two types of groups:

- **Dynamic groups** – Dynamic group membership changes to include anyone who meets the group's criteria.

  For example, you can set search criteria to create a group of all employee sales reps. When a new sales rep is hired, the rep automatically becomes a member of this dynamic group. When a sales rep takes a position in another department, that rep is removed from the group automatically. Whenever you use the Mail Merge feature to send bulk email to this dynamic group, NetSuite uses the search criteria to determine the current group members.

  You can create dynamic groups from new searches or saved searches. See Creating a Dynamic Group.

- **Static groups** – The membership of static groups doesn't change.

  You can create static groups by selecting members from lists or with a search. Support and sales groups must be static groups. See Creating a Static Group.

  You can use also CSV Import to create static groups. For more information, see the help topic Group Import.

  > **Note:** Be aware that you can't create a static group with more than 10,000 members. For groups larger than 10,000, you must create a dynamic group.

When you create a group, the **Restrict Group Editing to Owner** box is checked by default. Please be aware that if you clear this box, anyone with access to the group can modify it, delete members and access File Cabinet folders. You should ensure that the appropriate permissions have been applied to the roles assigned to this group.

For detailed information about groups, see the following topics:

- Creating a Dynamic Group
- Creating a Static Group
- Creating a Contact Group
- Adding and Removing Members of Groups

Creating a Dynamic Group

Dynamic group membership changes to include anyone who meets the criteria defined in a saved search.

For example, you can set search criteria to create a group of all employee sales reps. When a new sales rep is hired, the rep automatically becomes a member of this dynamic group. When a sales rep takes a position in another department, that rep is removed from the group automatically. Whenever you use the Mail Merge feature to send bulk email to this dynamic group, NetSuite uses the search criteria to determine the current group members.

You can create a dynamic group from an existing saved search or you can create a new saved search when you create the group.

To create a dynamic group:

1. Go to Lists > Relationships > Groups > New.
2. On the **Create Group** page, choose **Dynamic**.
3. Choose the kind of members you would like this group to contain.
4. Click **Continue**.
5. Enter a name for this group.
6. Select an existing saved search in the **Saved Search** list.
   - Only saved searches that include the kind of members you selected in step 3 appear in the list.
   - For more information about saved searches, see the help topic Defining a Saved Search.

     Depending on the kind of group you're creating, you can use joined searches to generate your results. For example, if you're creating a customer group, you can use a transaction search to give you the desired results. If you're creating a contact group, you can search for vendors that meet the criteria.

     After you select or create a saved search, the members of the group are shown on the **Members** subtab.
7. If the owner of this group is someone else, select that person in the **Owner** field.

   > **Note:** Owners for dynamic groups and saved searches are configured separately. Only the owner of the saved search can save changes when editing a saved search.
8. (Optional) If this group shares an email alias, enter the email address in the **Email** field.
9. (Optional) Enter other information about this group in the **Comments** field.
10. (Optional) Check the **Private** box if you want to restrict viewing (and also editing) of this group to its members.
11. (Optional) If you want to restrict access to this group to members of another group, select the group in the **Restrict To** field.

    > **Note:** Restricted groups can't be marked private. Restricted groups can only be used by members of the group you select in the **Restrict To** field.
12. (Optional) Clear the **Restrict Group Editing to Owner** box if you want to allow other group members to edit this group. By default, this box is checked.

    You should check the **Restrict Group Editing to Owner** box when you set up a group that controls access to sensitive information such as access to particular File Cabinet folders.

    If you intend to grant other members of the group editing permissions, You should either make the group private or restrict it to another group by enabling the relevant setting on the group records page. Don't store sensitive material in a File Cabinet folder that is accessible from a public group.

    You should also ensure that the role used to access the group has an appropriate CRM Groups access level assigned to it on the relevant manage roles page. Go to Setup > Users > Role > Manage Roles.

    If you clear the **Restrict Group Editing to Owner** box and choose to make your group public, any user with access to a role with edit-level access to CRM Groups can access and edit your group's content. This includes access to File Cabinet folders as well as adding and deleting members.

For more information about assigning role-based permissions, see the help topic Reviewing Permissions Assigned to Roles.

13. Click **Save**.

Now, every time a record of this type is created, it's added to this group if it matches the criteria in the saved search.

Creating a Static Group

The membership of a static group remains constant. You can create static groups by selecting members from lists and with a search. Support and sales groups must be static groups.

You can also use CSV Import to create and update static groups. For more information, see the help topic Group Import.

You can add or remove members from a static group at any time.

> **Note:** You can't create a static group with more than 10,000 members. For groups larger than 10,000, you must create a dynamic group.

To create a Static Group:

1. Go to Lists > Relationships > Groups > New.
2. On the **Create Group** page, choose **Static**.
3. Choose the kind of members you would like this group to contain.
4. Click **Continue**.
5. Enter a name for this group.
6. If applicable, complete the following:
   - If the owner of this group is someone else, select that person in the **Owner** field.
   - If this group shares an email alias, enter the email address in the **Email** field.
   - Enter other information about this group in the **Comments** field.
   - Check the **Private** box if you want to restrict viewing (and also editing) of this group to its members.
   - If you want to restrict access to this group to members of another group, select the group in the **Restrict To** field.

     > **Note:** Restricted groups can't be marked private. Restricted groups can only be used by members of the group you select in the **Restrict To** field.

   - Check the **Restrict Group Editing to Owner** box if you want to restrict editing permissions to the group owner as specified in the **Owner** field.

     You should enable the **Restrict Group Editing to Owner** preference whenever you're setting up a group to control access to sensitive information. For example, when restricting access to certain File Cabinet folders.

     If you want to grant other members of the group editing permissions, either make the group private or restrict it to another group by enabling the relevant setting on the group records page. Don't place sensitive material in a File Cabinet folder that's accessible from a public group.

     Also ensure that the role used to access the group has an appropriate CRM Groups access level assigned to it on the relevant manage roles page. (Go to Setup > Users > Role > Manage Roles.)

If you disable **Restrict Group Editing to Owner** and choose to make your group public, any user with access to a role with edit-level access to CRM Groups, can access and edit your group's content. This includes access to File Cabinet folders as well as adding and deleting members.

For more information about assigning role-based permissions, see the help topic Reviewing Permissions Assigned to Roles.

7. If you're creating an employee group, the following fields are available:
   - **Support Group** – Check this box to mark this group a support group.

     On case records, support groups are listed in the **Assigned To** field. When you assign a case territory, support groups are listed in the **Support Rep.** field.
   - **Product Team** – Check this box to mark this group as a product team.

     Product team groups can be selected in the **Product Team** field on issues. Product teams designate who's responsible for resolving an issue. Members of this team are emailed when an issue is first entered so that everyone is aware of the problem.
   - **Functional Team** – Check this box to mark this group as a functional team.

     Functional teams can be emailed copies of the issue from the **Communication** subtab on issue records. You may want to check this box for all product team groups and then create additional function team groups for other teams you want to email.
   - **Issue Role** – Select a role that corresponds to the role of this group's members, and this group can be assigned to issues.
8. On the **Members** subtab, do one or more of the following:
   - To add individual members, enter part of a member's name in the **Name** column, and press Tab. Select a member, and click **Add**. Repeat these steps for each member.
   - Click **Add Multiple**, and hold the Ctrl key to select more than one member from the list.
   - Click **Add With Search** to enter search criteria for the members you want to add.

     You can use more than one of these methods to add members to the same group. For example, you can select a few members individually and then add all the members that meet search criteria.

Depending on the kind of group you're creating, you can use joined searches to generate your results. For example, if you're creating a customer group, you can use a transaction search to give you the desired results. If you're creating a contact group, you can search for vendors that meet the criteria.

> **Note:** To access a Group's calendar, use the dropdown menu below the date selector on the calendar portlet.

To add a member to this group, open the group record. On the **Members** subtab, use one of the methods in step 8 to add a member.

To remove a member from this group, open the group record. On the **Members** subtab, click **Remove** on the row of the member you want to remove.

Creating a Contact Group

You can create a contact group from the contacts associated with an entity search or entity groups. If your company deals with customers, vendors, and other entities that are more often companies as opposed to individuals, you probably use contact records for the people you work with in those companies.

You can create contact groups based on contact record criteria or on criteria for the entity records those contacts are associated with. For example, you might want to create a group of contacts for all customer companies in a certain country. Your contact group would be based on customer search criteria.

For information about how to create a static contact group, see Creating a Static Contact Group.

For information about how to create a dynamic contact group, see Creating a Dynamic Contact Group.

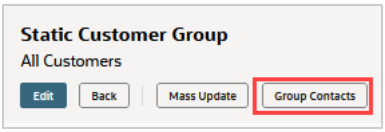
Creating a Static Contact Group

You can create contact groups based on searches for the record they're associated with. For example, you could search for all customers with a specific sales rep and create a group of all contacts associated with these customers.

To create a static contact group based on customer or other criteria:

1. Go to Lists > Relationships > Groups > New.
2. Select **Static**.
3. Choose the kind of record you want to enter criteria for.

   In the example mentioned above, you'd choose **Customers**. When you select **Contact**, the group can include members from more than one entity type.
4. Enter a name for your group.
5. On the **Members** subtab, click **Add With Search**.
6. Choose the criteria you want to use for the search.
7. Enter criteria for the records whose contacts you want to create a group from.
8. Click **Search & Select**.
9. Click **Add Static Members**.
10. On the **Create Static** Group page, click **Save**.
11. When the record has saved, click **Group Contacts**.



12. Enter a name for the static contact group.
13. If you want to remove any of the contacts from the group, choose the contact name and click **Remove**.
14. Click **Save**.

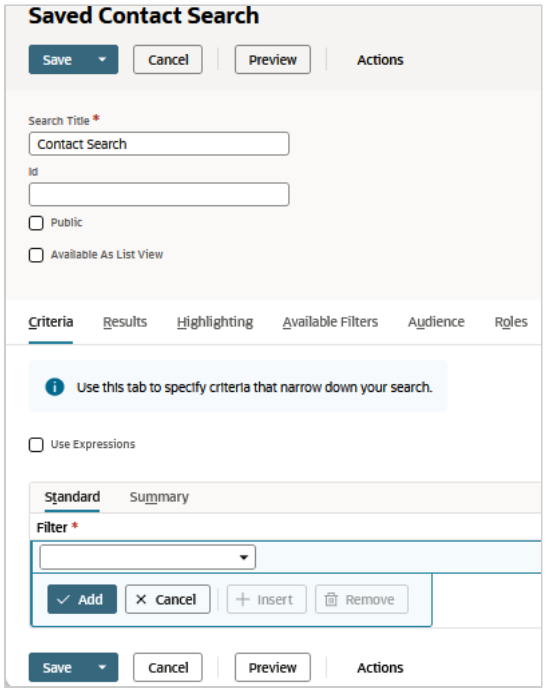
You can also create static contact groups from an entity group. To do this, open an entity group record, and click **Group Contacts** at the top of the record.

You can also use CSV Import to create and update static Contact groups. For more information, see the help topic Group Import.

Creating a Dynamic Contact Group

Dynamic groups are defined by search criteria. This means that the membership of a dynamic group changes as new contact records are created that meet your criteria and as existing contact records are edited and no longer meet the group criteria.

To create a dynamic contact group based on customer or other criteria, you should first go to Lists > Relationships > Contacts > Search and create a saved search for the contacts based on fields from customer or other records.



After you've created your saved search:

1. Go to Lists > Relationships > Groups > New, and choose **Dynamic**.
2. In the dropdown list, select **Contact**.
3. Click **Continue**.
4. Enter a name for the group.
5. In the **Saved Search** field, select the saved search you created.
6. Click **Save**.

Adding and Removing Members of Groups

Dynamic group membership is updated automatically as the results of the saved search change. You must add and remove members of static groups manually.

To add members to a static group:

1. Go to Lists > Relationships > Groups, and click the group you want to add a member to.
2. On the **Members** subtab, do one or more of the following:
   - To add individual members, enter part of a member's name in the **Name** column, and press Tab. Select a member, and click **Add**. Repeat these steps for each member.
   - Click **Add Multiple**, and hold the Ctrl key to select more than one member from the list.
   - Click **Add With Search** to enter search criteria for the members you want to add.

You can use more than one of these methods to add members to the same group. For example, you can select a few members individually and then add all the members that meet search criteria.

Removing Members

In the following procedure, see how to remove members from a static group.

To remove members from a static group:

1. Go to Lists > Relationships > Groups, and click the group you want to add a member to.
2. On the **Members** subtab, click **Remove** on the row of the member you want to remove.

Working with Transactions

A transaction is a record of a business event. Many transactions record financial agreements between your business and its customers or vendors, such as sales and purchase orders, invoices, vendor bills, and so on. Other transactions record events such as inventory adjustments and assembly build transactions.

Many transactions result in the posting of an amount to the general ledger (GL). Some examples of posting transactions are bank deposits, vendor bills, and credit memos. Those transactions that don't impact the general ledger are called non-posting transactions. Some examples of non-posting transactions are purchase orders, sales orders, and return authorizations.

Note: Processed lines for some transaction types contribute to the Monthly Transaction Lines metric that counts toward maximum limits for your NetSuite service tier. For more information, see the help topic Transaction Types Included in Monthly Transaction Lines Metric.

A transaction is a specialized type of a record. For general information about records, see Working with Records.

In NetSuite, you can also use customization tools to create your own transactions types. For more information, see the help topic Customization Overview.

Click a link below for information that is specific to transactions:

- Creating Transactions
- Entering Transaction Line Items
- Entering Relationships on a Transaction
- Entering Communication Information to a Transaction
- Tips for Working with Transactions
- Finding Transactions
- Voiding, Deleting, or Closing Transactions
- Memorized Transactions
- Preferred Transaction Delivery on Customer and Vendor Records
- Transaction Detail Report
- Transaction Detail Workbook Overview

- Limits for Display of Transaction Lists and Sublists

Most transactions support scripting using SuiteScript. For a list of scriptable transactions, see the help topic Transactions. The individual transaction topics in this area include a brief description of the transaction and a link to detailed information.

> **Note:** For information about the permissions you might need when working with transactions, see the help topic Permissions Documentation.

Creating Transactions

The types of transactions you can create and view depend on your role. Many roles have no access to transactions. The set of tabbed pages you see in NetSuite, called a center, also depends on your role. The centers are organized to facilitate your work. Most centers don't have a tab dedicated to transactions. You may find transactions on tabs with a variety of names, such as Customers, Vendors, Revenue, or Financial.

> **Note:** Processed lines for some transaction types contribute to the Monthly Transaction Lines metric that counts toward maximum limits for your NetSuite service tier. For more information, see the help topic Transaction Types Included in Monthly Transaction Lines Metric.

If you use the classic interface for NetSuite, you have a Transactions tab that provides access to all of the transaction types for which you have permission. This is a user preference in NetSuite. For more information, see Personal Preferences for Appearance.

To enter a transaction:

1. Click the tab where you access transactions, and click the kind of transaction you want to create.

   The transaction page opens with default information completed.
2. Enter or verify information in the required fields on the page. Required fields are marked with an asterisk (*).

   This information may include the transaction date, transaction number, transaction status, class/department/location classification, or a memo.

   > **Note:** In OneWorld accounts, after you select a subsidiary on a transaction and save it, the subsidiary can't be changed.
3. Enter information in the required fields in other areas of the page.

   NetSuite automatically completes certain data based on information you enter.

   For example, when you select a customer on an invoice, the customer's default ship to and bill to addresses automatically appear on the transaction. An administrator can configure the default values.
4. Enter data in the remaining fields as needed, including any custom fields that you've created.
5. Enter additional information for the transaction on each subtab.

   For example, sales order, cash sale, and invoice transaction pages include an **Items** subtab. When you select an item and click **Add**, the item appears as a line item on the transaction. Click on an existing line item to add or edit, insert, remove or clear that line item.
6. When you've finished entering data for the transaction, NetSuite provides various options for saving the transaction:
   - Click **Save** to save the information and return to the Transactions page.

- Click **Save & New** to save the information and open a new transaction page of the same type.
- Click **Save & Print** to save the information and send the transaction to the print queue.
- Click **Save & Email** to immediately save and email the transaction. The email message includes the transaction as a PDF attachment, which is created using the customer's preferred language.

Note: When you're working with transactions, you must save one page at a time. If you don't save each page, information isn't retained and can be lost when you click a different page.

NetSuite prompts you if any required field isn't completed. It also checks for basic data entry errors.

If you haven't completed a required field, you receive an error message about the missing data. Enter data in the required field, and click **Save** again. When the information is correct and complete, NetSuite accepts and records the transaction.

You can create and edit related records as you enter transactions. The following topics in this section include information about transactions and related records:

- Working with Addresses on Transactions
- Creating New Records as You Enter Transactions
- Editing Records as You Enter Transactions
- Defining Subsidiaries for OneWorld Transactions
- Using Transaction Links
- Linking a Transaction to a Support Case

Working with Addresses on Transactions

When you create transactions, the shipping and billing addresses from the entity record are used by default on the Shipping and Billing subtabs. If no shipping or billing address is available for an entity, the address field is left blank. You must enter shipping and billing information for the transaction.

When entering transactions, you can add or edit shipping or billing addresses on entity records from within the transaction. You can also enter a custom address that is used only for the specific transaction and not stored on the entity record.

Note: If you use an address in an entity record and then change the address after creating the transaction, ensure that you update the transaction record with the correct address. Otherwise, some address fields might be blank.

See the following sections:

- To add or edit address on the entity record, see Adding or Editing a New Address from a Transaction.
- To enter or edit a custom address for this transaction, see Adding or Editing a Custom Address for a Transaction.
- To change your state or province preference, see Setting the State or Province Field Preference.

Adding or Editing a New Address from a Transaction

You can add or edit an address for an entity from the transaction record.

To add a new address from a transaction:

1. Create a transaction. For more information, see Creating Transactions.
2. Enter entity in the appropriate field. For example, on a sales order, select a customer in the **Customer** field.

   The default shipping and billing addresses display on the **Shipping** and **Billing** subtabs. If there isn't a shipping or billing address for the entity, the **Ship To** or **Bill To** field is blank.
3. Click either the **Shipping** or the **Billing** subtab.
4. Select **New** in the **Ship To Select** or **Bill To Select** field, or click the **+** icon.
   - Check the box to make this address the default for shipping or billing.
   - Check the **Residential Address** box if this address isn't a business. This helps retrieve accurate rates when you use UPS or FedEx integration.
   - Enter a label to be displayed for this address in dropdown list address selectors.
   - Ensure the value for **Country** is correct. If it not, select a different country.
5. Enter the address information and click **Save**.

   The address is saved on the entity record.

Editing a New Address

You can edit an existing address from a transaction.

To edit an existing address from a transaction:

1. Create a transaction. For more information, see Creating Transactions.
2. Enter an entity in the appropriate field. For example, on a sales order, select a customer in the **Customer** field.

   The default shipping and billing addresses display on the **Shipping** and **Billing** subtabs. If there isn't a shipping or billing address for the entity, the **Ship To** or **Bill To** field is blank.
3. Click either the **Shipping** or the **Billing** subtab.
4. Select a different address in the **Ship To Select** or **Bill To Select** field.
5. A popup window appears. Edit address information as required.
6. Click **Save**.

   The address changes are saved on the entity record.

Adding or Editing a Custom Address for a Transaction

You can add custom shipping or billing addresses for a single transaction.

Custom addresses are created on transactions automatically when an address has been used in transactions and then the address is changed on the entity record. When the entity address is changed, the address used in the transactions is changed to a custom address to keep it unchanged.

To enter a custom address on transactions:

1. Create a transaction. For more information, see Creating Transactions.
2. Select an entity in the appropriate field. For example, on a sales order, select a customer in the **Customer** field.

   The default shipping and billing addresses display on the **Shipping** and **Billing** subtabs. If there isn't a shipping or billing address for the entity, the **Ship To** or **Bill To** field is blank.

3. Click either the **Shipping** or the **Billing** subtab.
4. Select **Custom** in the **Ship To Select** or the **Bill To Select** field.

   A popup window appears. Enter address information as required.

   - Check the **Residential Address** box if this address isn't a business.

     This helps retrieve accurate rates when you use UPS or FedEx integration.
   - Ensure the value for **Country** is correct. If it not, select a different country
5. Enter the address information and click **Save**.

   The address appears only on the transaction where it's entered and **isn't saved** on the entity record.

> **Note:** After a custom address is entered, to change it on the transaction you must select Custom again in the Select field.

Editing a Custom Address

You can edit a custom address on an existing transaction.

To edit a custom address on an existing transaction:

1. Open the transaction record.
2. Click the **Shipping** or **Billing** subtab.
3. In the **Ship to Select** or **Bill To Select** field, select **Custom**, and then click the **Edit** icon.

   A popup window displays address fields where you can change the address.
4. Click **Save**.

Setting the State or Province Field Preference

The Allow Free-Form States in Addresses preference affects the few cases where the state field appears as a body field on a record. In most cases, the state field isn't a body field, but is part of a subrecord, and isn't affected by this preference. When the state field is part of a subrecord, states entered as free text are automatically converted to abbreviations.

When the state field of the address appears as a body field on a record, you can set the format of the state or province field. Check the Allow Free-Form States in Addresses box to enter any text you choose in the State or Province field on addresses.

To set your State or Province field preference:

1. Go to Setup > Company > Preferences > General Preferences (Administrator).
2. Choose an option for the **Allow Free-Form States in Addresses** box:
   - Clear the box to disable free-form text entry in the **State/Province** field. Then, any text you enter is converted to standard state or province identifiers.

     Click here for more information about standard province identifiers.
   - Check the box to enable free-form text entry in the **State/Province** field. Then, you can enter any text and it isn't converted to standard state or province identifiers.
3. Click **Save**.

This preference doesn't affect your web store address form entries or UPS and FedEx shipping.

Creating New Records as You Enter Transactions

When you're entering transactions, you can create new records as you complete the transaction fields. You don't need to leave the transaction record to create new records.

For the following transactions in NetSuite, you must select an entity prior to adding a record from the transaction:

- **Write Checks** – You must select a payee before you can create a new account.
- **Enter Sales Orders** – You must select a customer before you can create a new job.
- **Accept Customer Payments** – You must select a customer before you can create a new bank account.

For example, you're entering checks and want to enter a new bank account. Select a payee and then click + next to the **Accounts** field. In the popup window, enter the new bank account name, account number, and whether the account is a subaccount of another. When you click **Save**, the Check page appears displaying the new account in the **Accounts** field.

Editing Records as You Enter Transactions

In NetSuite, some fields on transactions pages have an Open icon next to them. Click the Open icon to view the selected record in a new tab. In the new tab, click Edit and make changes as needed.

For example, when you're entering a sales order you may want to enter a new phone number for the customer. On the sales order, select the customer and then click the Open icon. On the customer record, click Edit and enter the new phone number. Then click Save. The changes you make to the open record are included in the sales order you're entering.

Defining Subsidiaries for OneWorld Transactions

Each transaction in NetSuite OneWorld, except advanced intercompany journal entries, is tied to one subsidiary. When a transaction includes an entity, such as a customer, the transaction is assigned to the same subsidiary as the entity. For transactions without entities, you must manually select a subsidiary. When you process transactions in bulk, such as fulfillments, bill payments, or commission authorizations, select the appropriate subsidiary to filter the list of transactions to process.

Intercompany journal entries post to two subsidiaries. These journal entries record transactions between subsidiaries. Each advanced intercompany journal record includes an originating subsidiary and one or more receiving subsidiaries. For more information, see the help topic Making Advanced Intercompany Journal Entries.

Some time entries and expense transactions may be associated with multiple subsidiaries. Each time or expense record is associated with the subsidiary of the employee. In addition, a customer or project can be defined for each line of these records. If the Intercompany Time and Expenses feature isn't enabled, each line-level customer or project must be associated with the same subsidiary as the employee. If this feature is enabled and related accounting preferences are set, customers and projects from other subsidiaries can be selected at the line-level. For more information, see the help topics Enabling Intercompany Time and Expenses, Expense Reports, and Understanding Time Tracking.

When a transaction has line-level associations to more than one subsidiary, the general ledger posts only to the subsidiary identified in the transaction header. Advanced intercompany journal entries can be created to transfer time, expense, or both charges from one subsidiary to another. An automated adjustment process is available for intercompany expenses. For more information, see the help topic Creating Intercompany Adjustments for Time and Expenses.

Note: In NetSuite OneWorld, List view pages and search results convert the transaction currency to the base currency of the user's subsidiary. For more information about List view pages, see List View.

Using Transaction Links

Most transactions in NetSuite provide links to other related transactions. You can use these links to drill down to the related transactions.

Some transactions provide links to the transactions from which they were created. For example, on a sales order the Created From link opens the estimate used to generate the sales order.

Other transactions have a link to the transaction created from them. For example, estimates have an Orders and Sales link. Click the link to open the sales orders, cash sales, and invoices created from the estimate.

Transactions such as payments or credits provide links to the transactions to which they're applied. For example, on a deposit the Payments subtab displays the payment transactions associated with that deposit. Clicking the date link next to a payment opens the payment transaction.

Linking a Transaction to a Support Case

You can link the following types of transactions to support cases:

- Sales orders
- Invoices
- Purchase orders
- Estimates
- Cash sale
- Opportunity
- Work order

For example, your company can create an invoice for a repair service performed for a customer and associate it with the support case that originated the service request.

To link a transaction to a support case:

1. Open a transaction record.
2. Click the **Related Records** subtab.
3. Click **Support Cases.**
4. Click **New Case** to create a new support case or click **Attach** to link an existing support case to the transaction.

Entering Transaction Line Items

Most transactions require you to enter one or more line items to account for the transaction total. Line items you enter determine the changes that post in NetSuite when you process the transaction. For example, when you enter line items on an invoice and post it, the inventory total decreases and the accounts receivable total increases, reflecting account changes for that transaction.

Note: The limit for transactions submitted through the user interface is 500 lines. For transactions submitted through CSV import, REST and SOAP web services, the limit is 5,000 lines per transaction. After you submit transactions exceeding the 500 lines limit through the CSV import or SOAP web services, you must do all additional changes and edits through the CSV import or SOAP web services.

For journal entries, these limits are 1,000 lines for the user interface, REST web services and for synchronous SOAP web services, and 10,000 lines for CSV import and asynchronous SOAP web services.

You should limit yourself to 200 lines or less on a purchase order unless they're to be received by WebServices.

Note: Processed lines for some transaction types contribute to the Monthly Transaction Lines metric that counts toward maximum limits for your NetSuite service tier. For more information, see the help topic Transaction Types Included in Monthly Transaction Lines Metric.

The method for entering line items depends on the type of transaction you're creating. Line-item information is entered by either selecting and entering data and adding as a line item, or by selecting lines with check boxes.

Entering Line Items by Entering Data

In the following procedure, you see how to select and enter data and add them as a line item.

To enter line items by entering data:

1. Add the line-item information to the form.
2. Click **Add** to add the information as a line item.

   The transaction total is updated in the header as you add each line item, and a new, empty line is added.
3. Add more line items as necessary.
4. Click **Save**.

Entering Line Items by Selecting Lines From a List

In the following procedure, you see lines of data, each with a box on the left. Many pages have data-entry fields on the line.

To enter line items by selecting them from a list:

1. Check the box next to the line you want.
2. If there are data fields, enter values into them.
3. Repeat Steps 1 and 2 until you've chosen all your line items.

   The transaction total is updated in the header as you check each line item.
4. Click **Save**.

To change a line item, click on the line in the list. When the line-item data appears in the center of the page, make your changes and then click Edit.

To remove a line item, click on the line in the list and then click Remove.

If you use the U.S. Version of NetSuite, you can charge taxes on a line item basis. For more information, see the help topic Setting U.S. Tax Preferences.

Recalculating Line Item Amounts When the Tax Code Changes

When you change the tax code on a line item, the system recalculates the amounts depending on the order of the columns on the form.

If the **Amount** column is before the **Gross Amt** column, then whenever you change the tax code on the line item, the system updates the value in the **Gross Amt** column based on the tax rate of the selected tax code. The value in the **Amount** column doesn't change.

If the **Amount** column is after the **Gross Amt** column, then whenever you change the tax code on the line item, the system updates the value in the **Amount** column, based on the tax rate of the selected tax code. The value in the **Gross Amt** column doesn't change.

For information about rearranging the order of the columns, see the help topic Configuring Fields or Screens.

Entering Relationships on a Transaction

You can associate contacts with a transaction by adding them on the Relationships subtab.

If you enabled the Multi-Partner Management feature, you can associate partners with the transaction. For more information, see the help topic Associating Partners With Customers and Transactions.

The Relationships subtab appears only on transactions that involve working with customers, partners, or other entity records. Entity records include company, contact, vendor, and employee.

To add contacts when creating a transaction:

1. On the transaction page, click the **Relationships** subtab.
2. Under **Contacts** , enter the contact's name, title, email address, phone number, subsidiary, and role, and click **Add**.
3. Click **Save**.

You can also add contacts in view or edit mode after the transaction has been created.

Entering Communication Information to a Transaction

Use the Communication subtab to write and send messages to your customers. You can also create tasks, events, and phone calls and associate them with a transaction.

After you save the transaction, this information is combined on an Activities subtab. This enables you to track meetings and conference calls you schedule in the process of finalizing a sale.

Some transaction records don't have a Communication subtab.

Attaching Messages to a Record or Transaction

You can add messages as HTML, PDF, letter, or fax attachments. You can also embed the transaction within the body of the message.

To attach messages as PDF, letter, or fax, you must have the Mail Merge feature enabled. For more information, see the help topic Working with Mail Merge.

The Communication subtab tracks all related email and faxes sent and received. For information about sending messages, see Sending Email from NetSuite.

Attaching Files to a Record or Transaction

You can attach documents in the File Cabinet to records and transactions using the Communication subtab. For more information, see Attaching Files to Records.

Attaching Events, Tasks, and Calls to a Record or Transaction

You can create and track activities directly from the transaction. For more information, see the help topic Attaching Events, Tasks, and Calls to Records and Transactions.

Adding User Notes to a Record or Transaction

To add any notes related to the record or transaction you're working with, on the Communication subtab, click the User Notes subtab. Then click New Note. The list permission Notes Tab controls access to the User Notes subtab. You need at least Create level access to see the New Note button and add a note.

Tips for Working with Transactions

Refer to the following sessions for tips when working with transactions:

- Customize
- Use Options
- Print, Fax, Email, and Copy
- Memorize
- Maintain
- Close
- View the General Ledger
- Use Shortcuts & Keyboard shortcuts
- Get help

Customize

- Most transaction forms can be customized by using the **Customize** menu at the top of the page. The appropriate permission is required to customize the form. If you don't see the **Customize** menu, your current role doesn't include the permission.
- Click **List** to open a list of all transactions of a specific type. From these lists, you can view and edit transactions, print and export your lists, and go to transactions' registers. Your customization of the viewing and sorting of the list will retain for the future views. You can change the list sorting by clicking another column heading.
- Amount fields in transactions and records support computation. For more information, see Amount Fields.

Use Options

- Some fields on transaction forms display a double arrow button that you can click for the **List**, **Search**, and **New** options:
  - Click **List** to display a popup list of stored records from which to choose.
  - Click **Search** to search for a record.
  - Click **New** to open a window and create a new record for that field.
- On transactions and records that have buttons with a dropdown list, you can select a different button option. Use the Tab key to go to the dropdown button. Then use the Down Arrow key to expand the dropdown list. Click Enter to select the desired action. To collapse the dropdown list, use the Up Arrow key.

  For more information, see Popup and Dropdown Lists and Buttons and Menus in NetSuite.
- Click **Add Multiple** in the **Items** subtab to open the Choose Item window. This window displays a list of items you can add. You can filter the list by item type or search for all or part of a name. When you click an item in the left pane, it's added to the right pane, where you can enter a quantity for the item. When you click **Done**, items and quantities shown in the right pane are added to the transaction.

Print, Fax, Email, and Copy

- When you post a transaction, you can print, fax, or email a copy of the form:
  - Check the **To Be Printed** box to save the form in a queue for printing later.
  - Check the **To Be E-mailed** box and enter or verify an email address to email the form.
  - Check the **To Be Faxed** box and enter or verify a fax number to fax the form.

  Administrators configure the fax and print setup at Setup > Company > Preferences > Printing & Fax (Administrator). For more information, see the help topic Setting Printing and Fax Preferences.

  Administrators configure the e—mail setup at Setup > Company > Email > Email Preferences (Administrator). For more information, see the help topic Setting Email Preferences.
- When you view a transaction, you can make a copy of the transaction:
  - From the **Actions** list, select **Make Copy** to replicate all the information from the original transaction and link it to the original transaction.

    For example, if you create an invoice from a sales order, the value in the **Created From** field is copied to the new transaction. The new transaction is also displayed in the history of the original transaction.
  - From the **Actions** list, select **Make Standalone Copy** to make a copy of the original transaction that includes inventory costing but isn't associated with the original.

    For example, click **Make Standalone Copy** on a transactionw that uses advanced shipping to create a cash sale or invoice that has the same items as the original and includes the cost of good sold (COGS) account impact in addition to revenue. Because a standalone copy isn't linked to the original, it doesn't retain the value in the **Created From** field. The new transaction isn't part of the history of the original transaction and is considered a brand new transaction.

Memorize

Memorize a transaction to recall and use it again later. To memorize a transaction, go to the transaction type you want to memorize. Add the appropriate information to the form. From the **Actions** list, select **Memorize**. The Memorized Transaction page opens showing the information you entered. For more information, see Memorized Transactions.

Maintain

- To maintain performance, the limit for transactions submitted through the user interface is 500 lines. For transactions submitted through CSV import or SOAP web services, the limit is 5,000 lines per transaction.
- For journal entries, the limit is 1,000 lines for the user interface and for synchronous SOAP web services, and 10,000 lines for CSV import and asynchronous SOAP web services.

For more information, see Entering Transaction Line Items.

Close

- Close a line item on a transaction if you don't expect to fulfill or receive the item. To close a line item on a transaction, click **Edit** on the transaction. Click the line you want to close and then check the **Closed** box. Click **Done** and then click **Save**.
- Close an entire transaction so that it no longer has an open status. When you view sales orders, purchase orders, and return authorizations, click **Close** to check the **Closed** box for all lines on the transaction. Then when you click **Save**, the transaction is no longer open.

View the General Ledger

To view the general ledger results of posting transactions, from the **Actions** list, select **GL Impact**. The details of the general ledger impact of lines on the originating transaction are displayed.

Use Shortcuts & Keyboard shortcuts

- Use the **Shortcuts** menu to place a shortcut link on your home page to frequently-used transactions. For more information, see Navigation Menu.
- Transactions support many of the same keyboard shortcuts as other records. When using tabbed display, you can switch between subtabs by using keyboard shortcuts. Each subtab has a single letter underlined in the title. Press and hold the **Alt** key on your keyboard and then press the corresponding letter to switch to that subtab. The first field on the subtab is automatically selected. For information, see Keyboard Shortcuts.

Get help

- Click the **Help** link at the top of the page to get help specific to the transaction you're working with.
- Click the **field name** to display a popup window with field level help.

> **Important:** When processing transactions in bulk, you must submit one page at a time. If you don't process each page individually, information isn't retained and can be lost when you click a different page.

Finding Transactions

You can search for transactions in several ways.

To review or edit an existing transaction, select from these five procedures:

- Quick Find
- Previous or Next

- Go To Register
- Search by Account
- Search Transactions

Quick Find

Use the Quick Find tool for a quick search for transactions and other items.

To find a transaction with the Quick Find tool:

1. On any **Transaction** page, click **Quick Find** at the top of the page.
2. When the Quick Find page pops up, enter some information to help you find this transaction or related group of transactions:
   - In the **Name** field, select the company or contact from the list whose transactions you'd like to find.
   - In the **Date** field, enter or pick the posting date of the transactions you'd like to find.
   - In the **Number** field, enter the number of the transaction you'd like to find.

     For example, enter **1135** to find check #1135.
3. Click **Submit**.

Previous or Next

Use the Previous or Next icon to see the transaction you want.

To find the previous or next transaction:

1. Click the **Transactions** tab.
2. Click the type of transaction you want to find.
3. On the transaction page, click **Previous** or **Next** until you see the transaction you want.
4. Select the appropriate button to edit, print, email, credit, or otherwise work with this transaction.

Go To Register

Use the register to find a specific transaction.

To find a transaction through the register:

1. Click the **Transactions** tab.
2. Click the type of transaction you want to find.
3. On the transaction page, from the **Actions** list, select **Go To Register**.
4. If the transaction you want doesn't appear on the register, clear the **Open** box to see all transactions.
5. Click **Submit**.
6. On the full register, scroll to find the transaction you want.
7. Click the transaction date in the left-hand column to see the details. A view-only version of the transaction opens.
8. Select the appropriate button to edit, print, email, credit, or otherwise work with this transaction.

Search by Account

Use the chart of accounts to find a transaction.

To find a transaction by account:

1. Go to Lists > Accounting > Accounts.
2. Click the name of the account with the transactions you want to see.

   For example, if you want to locate a recent invoice, click an **Accounts Receivable** account.
3. When the register appears, clear the **Open** box if you want to see all transactions.
4. Click **Submit**.
5. Scroll to find the transaction you want.
6. Click the transaction date in the left-hand column to see the details.

   A view-only version of the transaction opens.
7. Select the appropriate button to edit, print, email, credit, or otherwise work with this transaction.

Search Transactions

Use the Search Transactions tool to find a transaction.

To find a transaction with the Search tool:

1. Go to Transactions > Management > Search Transactions.

   The type of search form you see is the type of search you last used to search for transactions.
2. If you see the search fields you want to use, enter criteria in the fields and click **Submit** for quick results.
3. If you don't see fields displayed, you're using Advanced Search Mode. If you're not in Advanced Search Mode and don't see the fields you want to use, check the **Use Advanced Search** box at the top of the page.
   1. In Advanced Search Mode, use the **Criteria** subtab to select the filters you want to use when searching.
   2. In the criteria popup, enter criteria for that filter.
   3. Click **Add/Edit**.
   4. On the **Results** subtab, you can select the fields from the resulting transactions that you want to see on your results list.

      Select a field, and click **Add**.

      > **Note:** For a transaction search, adding a field that has multiple values for one record causes that record to occur multiple times in the search result. Also, if results include a record with a link type that has multiple values for that record, duplicates occur in results, even if the link type field isn't included as a search results field.
   5. Click **Submit** to run the Search.

Voiding, Deleting, or Closing Transactions

You may need to change a transaction you've entered if it has errors or you don't intend to complete it. The following sections explain the differences between voiding, deleting, and closing transactions:

- Voiding Transactions
- Deleting Transactions
- Closing Line Items and Transactions

Important: Before you delete or void a posting transaction, check to ensure that the transaction isn't part of a match on the Reconcile Account Statement page. You shouldn't delete transactions that have been reconciled. For more information, see the help topic Viewing Submitted Transactions.

Voiding Transactions

Voiding a transaction sets its total and all its line items to 0 but doesn't remove it from the system. This is the preferred way to cancel an existing transaction because the audit trail is preserved. After you void a transaction, you can't make changes that have general ledger impact to the original transaction, including changing the posting period.

If you void a transaction that was created to close another transaction, the original transaction is reopened. For example, if an invoice was created to bill a sales order, voiding the invoice reopens the sales order and sets the order's status to pending billing. Then you must invoice the order again. Another example is a bill payment that has been applied to a bill. If you void the bill payment, the bill is reopened. Another payment must be entered against the bill.

To void a transaction:

1. Open the transaction for editing.
2. Click Void.

   If the preference to void transactions with a reversing journal entry has been enabled, only certain types of transactions can be voided. For more information, see the help topic Void Transactions Using Reversing Journals Preference.

Voided sales orders don't show on the Transactions subtab of customer records. To view voided sales orders, go to Transactions > Sales > Enter Sales Orders > List.

Additional help is available for some transaction types as follows:

- For information specific to check transactions, see the help topic Voiding a Check.
- For information specific to credit cards, see the help topic Voiding Credit Card Transactions.

Deleting Transactions

Important: If the Use Deletion Reason feature is enabled in your account, users must provide a reason for deleting transaction records. For more information about the feature, see the help topic Recording a Reason for Deleting a Transaction.

You may want to remove a transaction from the system entirely. For example, after entering a transaction you may realize it contains many errors. You can delete it and reenter the transaction.

From the Actions list on the transaction, select Delete. This option appears only if the Void Transactions Using Reversing Journals preference isn't enabled. Only users with a role that has full permission to a type of transaction can delete that type of transaction. If you don't have the necessary permission, Delete doesn't appear on the Actions list.

If inline editing is enabled in your account and you have the necessary permission, you can delete transactions from the transaction's List page. Hover over the New column and click Delete Record from the menu that appears. For more information about inline editing, see Using Inline Editing.

If the Use Deletion Reason feature is enabled in your account, both deletion methods open a Delete popup window specific to the type of transaction being deleted. You must select a deletion reason and may optionally include a memo. If you select the deletion reason Other, you must include a memo. When you click Delete, the transaction record is removed from your system.

A deleted transaction doesn't keep a record of the transaction details. However, a record of the deleted transaction remains in your audit trail.

Note: You can't delete a transaction if it's linked to other transactions. For example, you can't delete an invoice that has been paid. You can, however, close linked transactions.

Closing Line Items and Transactions

You can manually close transaction line items when you don't intend to fulfill or receive open items on the order. For example, you sell 10 items to a customer and have already fulfilled five of them. Then you discontinue the item and can't fulfill the remaining five. If you close the line manually instead of changing the quantity, you retain a record of how many were ordered originally.

To close a line item on a transaction, click Edit on the transaction. Click the line you want to close, check the box in the Closed column and click Done. Then click Save.

Note: You must bill the sales order before you manually close the line. When all lines on a sales order are fulfilled or closed manually, the sales order is removed from the billing and receiving queues.

When you view sales orders, purchase orders, and return authorizations, click the Close or Close Remaining button to close the entire transaction. This action checks the Closed box for all lines on the transaction and changes the status of the transaction to Closed. You can reopen a closed transaction by clearing the Closed box for all lines on the transaction.

For specific information about sales orders, see the help topic Closing a Sales Order.

Memorized Transactions

Note: To work with memorized transactions, you need a View level of the Memorized Transactions permission.

A memorized transaction is a transaction you set up to recur in NetSuite, such as recurring journal entries. Memorized transactions eliminate data entry and serve as useful reminders. A memorized transaction consists of two parts:

- The **Memorized Transaction Template** defines the transaction to be created.
- The **Memorized Transaction Definition** sets the parameters for when to create the transaction, whether they're recurring, and how many transactions to create.

When you memorize a transaction, you set up the transaction to recur over time. You choose whether the transaction automatically posts or if you're reminded to post it. Set the frequency the transaction should occur and set posting options. You can specify that the transaction should recur forever or a set number of times.

When you edit or delete a memorized transaction, the change is tracked on the system notes of the memorized transaction.

The following are limitations for posting memorized transactions in locked and closed periods:

- A user must have the Override Period Restrictions permission to enable the Allow Posting in Locked Period option for a memorized transaction. When this option is enabled, memorized transactions can post in locked periods even if users initiating these transactions don't have the Override Period Restrictions permission.
- Transactions can never be posted in closed periods. If the posting date for a memorized transaction is in a period that has been closed, it's posted to the next open period.

In NetSuite, you can memorize the following transactions:

- Checks
- Deposits
- Credit Cards
- Purchase Orders
- Bills
- Sales Orders
- Invoices
- Estimates
- Cash Sales
- Journal Entries
- Statement Charges
- Work Orders
- Purchase Requisitions
- Transfer Orders
- Opportunities
- Custom Transactions

The Reminders portlet includes a standard reminder for Memorized Transactions due. For more information, see the help topic Setting Up Reminders.

After you've memorized a transaction, you can view and manage transactions created by the memorized transaction by going to Transactions > Management > Enter Memorized Transactions. Click **Edit** next to the transaction. The Transactions subtab shows associated transactions.

The time when the system runs memorized transactions varies by location, but it's usually shortly after midnight each day. The system checks for memorized transactions every four hours, and processes them according to the start date. If the start date is the current day, the system processes the transaction immediately, and then at the usual time each day afterward. If the start date is in the future, the system processes the transaction at the usual time on that future date, and each day afterward. If the start date is in the past, the system processes a transaction for each past day every four hours until caught up to the current day, then processes a transaction at the usual time each day afterward.

By default, when NetSuite creates a memorized transaction automatically, it lists the last user who edited the memorized transaction definition as the user who created the transaction. This user is visible in the memorized transaction definition. To list the user as –System- for automatic memorized transactions, set the **Create Automatic Memorized Transactions as –System-** preference at Setup > Company > Preferences > General Preferences (Administrator). Changes to this preference take effect when you create a new memorized transaction definition or you edit and save an existing one. For more information, see the help topic Setting General Account Preferences.

Note: When set, this preference doesn't support server-side scripting. If you want to use server-side scripting and SuiteFlow on transactions, disable the preference.

For specific instructions, see the following topics in this section:

- Memorizing a Transaction
- Submitting Memorized Transactions
- Editing Memorized Transactions
- Customizing the Memorized Transactions List
- Viewing the Status of Memorized Transactions
- Deleting Memorized Transactions

Memorizing a Transaction

For a list of the types of transactions you can memorize, see Memorized Transactions.

When you create a memorized transaction, you can view this action in the system notes of the memorized transaction.

- To memorize a transaction:
- Automatic Memorized Transactions

To memorize a transaction:

1. Edit the transaction you want to memorize, and make sure the appropriate information is filled in.
   - Posting transactions that contain serial or lot numbers can't be memorized. This includes creating invoices, entering cash sales, and fulfilling sales orders.
   - Non-posting transactions with serialized or lot items can be memorized, if the serial or lot numbers aren't entered on the transaction. This includes preparing estimates and entering sales orders.

     Memorized non-posting transactions with serialized items require serial numbers to be entered at item receipt or fulfillment time. For example, you create a sales order that includes a serialized item but don't enter the serial number for that item. Later, when you fulfill that sales order, you'll be required to enter the serial number for the serialized item.
   - If you select to email or fax your customer, your customer automatically receives an email or fax each time the memorized transaction occurs.
   - If you enter credit card payment information, this credit card is automatically charged each time the memorized transaction occurs.
2. From the **Actions** list, select **Memorize**.

   When the Memorized Transaction page opens, the payee, vendor, customer, or project name you selected when entering your memorized transaction appears in the **Name** field.
3. If you want to change the name of the memorized transaction, enter a new **Name**.

   The name you enter appears in the list of memorized transactions but doesn't affect the name you entered on the original transaction.
4. Choose one of three options in the **Action** dropdown list in the Primary Information section:
   - Choose **Template Only** if you want to create a memorized transaction that will be used as a template, but won't create any transactions.
   - Choose **Reminder** if you want to be reminded when this transaction is due so that you can view and edit it before you save it.

- Choose **Automatic** if you want this transaction to automatically post. For information about this option, see Automatic Memorized Transactions.

5. Check the following optional boxes as needed:
   a. Check the **Inactive** box to prevent the memorized transaction from creating any more transactions.
   b. Check the **Override Transaction Date** box if you don't want the transaction to post on the creation date. Then you must do the following:
      - In the **Next Date** field in the **Recurring** subtab, enter the next date you want the transaction to be generated.

        If you want this transaction to automatically occur, you must enter a next date here. If you don't enter a next date, the transaction won't automatically post.
      - In the **Next Transaction Date** field beside Next Date, enter the date you want the transaction to post.

        For example, today's date is 7/15. You want the first transaction to be generated on 7/16 and to post on 7/20. Check the **Override Transaction Date** box and enter 7/16 in the **Next Date** field and 7/20 in the **Next Transaction Date** field beside **Next Date**.
   c. Check the **Allow Posting in Locked Period** box to enable the transaction to post to an accounting period for which transactions are locked. You must have the **Override Period Restrictions** permission to check this box.

      When this box is checked, memorized transactions can post in locked periods even if the user who initiates the transaction doesn't have the **Override Period Restrictions** permission. Transactions can never be posted in closed periods. If the posting date for a memorized transaction is in a period that has been closed, it's posted to the next open period. For more information, see the help topic Accounting Period Management.
   d. Check the **Update Addresses** box to have the memorized transaction use the customer email, fax, and address information that is current as of the date the transaction is created. This option applies only to addresses on the customer record. Any other addresses, such as those included in the To Be Emailed list, must be updated manually.
   e. Check the **Update Prices** box to have the memorized transaction use sales pricing that is current as of the date the transaction is created.
6. To set the frequency of the memorized transaction, choose one of the following options:

   Note: You can't set a frequency if you selected **Template Only** in the Action list in the Primary Information section.

   a. To create recurring transactions based on the number of occurrences within a time period, enter the following in the **Recurring** subtab:
      - Select the **Next Date** on which the memorized transaction will create a new transaction.
      - Select the number of times in a time period a transaction will be created in the **Repeat Every** field.
      - Select the **Time Period** over which transactions will be created.
      - Enter the total number of transactions which should be created in the Number Remaining field. If you don't want to set a limit on the number of transactions created, clear the field and check the **Indefinite** box.
      - If you checked the **Override Transaction Date** box in the **Primary Information** subtab, enter the **Next Transaction Date** on which you want the transaction to post.
   b. To create transactions on specific dates, enter the **Next Date** to generate a transaction in the Custom Dates subtab and click **Add**. If you checked the **Override Transaction Date** box

in the **Primary Information** subtab, enter the **Next Transaction Date** on which you want the transaction to post.

The frequency determines how often you receive the reminder if you choose **Remind Me**. If you choose **Automatic**, it determines how often the transaction occurs.

> **Note:** If **Monthly** is selected, and the **Next Date** selected is the last day of a month, NetSuite will schedule all following transactions for this memorized transaction for the last day of each month. For example, if you select a Monthly frequency and set the Next Date as 2/28/2019, subsequent transactions will occur on 3/31/2019 and 4/30/2019.
>
> If you want your transactions to occur on the 28th, 29th, 30th, or 31st of every month, set up a custom frequency in the Custom Dates subtab.

7. When you've finished, click **Save**.
8. If you clicked **Automatic** for this memorized transaction, you'll be prompted to continue.
9. Click **OK**. Your memorized transaction is saved.

After you create a memorized transaction, you can review it in the following ways:

- Go to Transactions > Management > Enter Memorized Transactions > List. Select it from the list.
- Go to Transactions > Management > Enter Memorized Transactions. Click **View** or **Edit** next to the transaction.
- Go to your NetSuite Home page and click the reminder you set up.

  Clicking the reminder takes you to a list showing memorized transactions that are currently due. To see all your memorized transactions, check the **Show All** box and click **Refresh**.

To view a list of memorized transactions due to be entered, go to Transactions > Management > Enter Memorized Transactions.

Automatic Memorized Transactions

If an error occurs when automatically executing a transaction, NetSuite generates an alert message and changes the memorized transaction from **Automatic** to **Remind Me**. In this case, the transaction will no longer be automatically generated. You must determine the cause of the error, then update the transaction to correct the problem. After you update the memorized transaction, you can again select the Automatic option on the memorized transaction. The memorized transaction will run automatically on the next scheduled date.

For example, an account used in a memorized journal entry has become inactive. You receive an alert that the transaction can't be run. Update the journal entry with an active account number. Then select the Automatic radio button on the memorized transaction to reset the journal entry to run as scheduled.

Submitting Memorized Transactions

After you've set up memorized transactions you can submit all transactions due to be posted at one time.

To create memorized transactions, see Memorizing a Transaction.

To submit memorized transactions:

1. Go to Transactions > Management > Enter Memorized Transactions.

2. On the Enter Memorized Transactions page, use the following filters to show transactions in the list:
   - **Date**

     Enter or select the date you want these transactions to post.

     The current date defaults in this field.
   - **Use Next Date**

     Check this box to use the date of the next scheduled occurrence of the transaction as the posting date. For transactions without a next date, the current date is used.

     When this box is unchecked, the current date shows in the date field and is the posting date.

     NetSuite remembers your preference for this box and checks or clears it the next time you use this form.
   - **Has Remaining**
     - Select **Yes** to show only transactions with remaining scheduled occurrences.
     - Select **No** to show transactions with no remaining occurrences.
     - Select **All** to show all memorized transactions.
   - **Next Date**
     - Select a date range to filter the list to show only transactions whose **Next Date** falls within this range.
     - Select all to show all memorized transactions.
   - **Action**
     - Select **All** to show all memorized transactions.
     - Select **None** to show no memorized transactions.
     - Select **Automatic** to show memorized transactions that automatically post and don't send a reminder.
     - Select **Reminder** to show memorized transactions that send a reminder for you to post them.
     - Select **Template Only** to show memorized transaction templates which don't create transactions.
   - **View**

     If you've customized list views, select a custom view in this field.
3. To edit an individual transaction, click its **Edit** link.
4. To process several memorized transactions at one time, check the box in the **Enter** column next to each transaction you want to process.

   You can also choose to click the **Enter** link next to a transaction to enter it individually.
5. To change all memorized transactions from Automatic to Remind Me, or from Remind Me to Automatic at the same time, click **Switch Action**.
6. Click **Submit**.

   A list of the new transactions shows on the Processed Transactions page.

> **Note:** There must be at least ten transactions for NetSuite to split the transactions into multiple workqueues.

To view a list of all memorized transactions, go to Transactions > Management > Enter Memorized Transactions > List.

Important: When the **Allow Posting in Locked Period** option is enabled for a memorized transaction, transactions can post in locked periods even if users initiating these transactions don't have the **Override Period Restrictions** permission. Transactions can never be posted in closed periods. If the posting date for a memorized transaction is in a period that has been closed, it's posted to the next open period. For more information, see the help topic Accounting Period Management.

Editing Memorized Transactions

You can make name, type, and schedule changes to a memorized transaction. You can also specify posting options and update addresses to ensure that your information is accurate. However, if the field that you want to edit on the memorized transaction is **dimmed** or **not included on the page**, you **must** create a new original transaction and then memorize that transaction.

Some details that appear on the Memorized Transactions page at Transactions > Management > Enter Memorized Transactions > List don't appear when you edit the transaction. For example, the transaction amount appears on the Memorized Transactions page, but not when you edit the transaction. You can edit such fields on the original transaction. For more information, see Working with Transactions.

When you edit a memorized transaction, the change is tracked on the system notes of the memorized transaction.

To edit specific details of a memorized transaction:

1. Go to Transactions > Management > Enter Memorized Transactions > List.
2. Click **Edit** next to the transaction you want to change. For a description of the fields, see Memorizing a Transaction.

   Note: You must have the **Override Period Restrictions** permission to enable the **Allow Posting in Locked Period** option. After this option is enabled, memorized transactions can post in locked periods even if users initiating these transactions don't have the **Override Period Restrictions** permission. Transactions can never be posted in closed periods.
   If the posting date for a memorized transaction is in a period that has been closed, it's posted to the next open period. For more information, see the help topic Accounting Period Management.

3. Make your changes and click **Save**.

Your memorized transaction is now updated with the current information.

Customizing the Memorized Transactions List

When you view the Memorized Transactions list, you can customize the list view to show columns with additional information. For example, you can display whether transactions are set to be emailed.

To customize the memorized transactions list:

1. Go to Transactions > Management > Enter Memorized Transactions > List.
2. Click **Customize View**.
3. If the **Results** subtab isn't displayed, click the **Results** subtab.
4. Select additional fields or change existing ones using the lists in Fields column.

To display whether transactions are set to be emailed, for example, select **Transaction Fields...** and then in the **Transaction Field** list in the popup window, select **To Be Emailed**.

5. When you've finished with a row, click **Add** or **OK**.
6. When you finished your changes, click **Save**.

The Memorized Transactions list is a list view similar to other in NetSuite. For more information about how you can customize lists, see Customizing List Views.

Viewing the Status of Memorized Transactions

You can view the status of memorized transactions by going to Transactions > Management >Enter Memorized Transactions > Status.

Each scheduled memorized transaction is shown along with the status. The statuses include:

- **Complete** – The transaction has been successfully created.
- **Failed** – The transaction was not completed due to an error.
- **Pending** – The transaction has been queued and will be processed in turn.
- **Processing** – The transaction is currently being created.

If a memorized transaction fails, an Error link is shown in the Message column. Click this link to open the error message that explains why the memorized transaction process failed.

You can customize the list of memorized transactions by clicking Customize View.

Deleting Memorized Transactions

You can delete a memorized transaction if you don't want it to recur anymore. Deleting a memorized transaction doesn't delete the associated transactions.

When you delete a memorized transaction, the change is tracked on the system notes of the memorized transaction.

> **Note:** It isn't possible to delete a memorized transaction that is used by auto-create rules. You need to delete the auto-create rule first to be allowed to delete the related memdoc.

To delete a memorized transaction:

1. Go to Transactions > Management > Enter Memorized Transactions > List.
2. Click **Edit** next to the transaction you want to delete.
3. From the **Actions** list, select **Delete**.

   > **Note:** If you don't see the Actions list with a Delete option, your role doesn't have the correct permission level. You must have the full level of the Memorized Transactions permission to delete a memorized transaction. For more information, see Memorized Transactions.

   NetSuite prompts you to confirm the deletion.
4. Click **OK**.

Preferred Transaction Delivery on Customer and Vendor Records

Because each customer and vendor can have an individual preference for how to receive transactions, you can set a preferred transaction delivery method on their records as the default way to deliver transactions to them.

NetSuite automatically generates transaction email whenever the following records are saved:

Blanket Purchase Order	Cash Refund	Cash Sale	Credit Memo
Estimate	Invoice	Opportunity	Purchase Contract
Purchase Order	Request For Quote	Requisition	Return Authorization
Revenue Commitment	Revenue Commitment Reversal	Revenue Contract	Sales Order
Transfer Order	Vendor Request For Quote	Work Order	

On each customer and vendor record, define the entity's preferred way to receive transactions: by regular mail (printing), by email, by fax, or by a combination of the three. Then, the preferred delivery method is marked by default in the following situations:

- on transactions when you select that customer or vendor
- on transactions created from that customer or vendor record
- on transactions that are copied or converted from a transaction that uses these settings

  For example:

  - If you click Make Copy on an invoice, then the delivery preferences default from the customer record on the new copy of the invoice.
  - If you click Bill on a sales order, then the delivery preferences default from the customer record on the bill that is created.

To define the preferred transaction delivery method on entity records:

1. Open the entity record.
   - For Customers: Go to Lists > Relationships > Customers > New. Click **Edit** next to the customer whose record you want to update.
   - For Vendors: Go to Lists > Relationships > Vendors > New. Click **Edit** next to the vendor whose record you want to update.
2. Click the **Preferences** subtab.
3. Next to **Send Transactions Via**, check the appropriate boxes:
   - **Email** – Check this box to check the **To Be Emailed** box by default on transactions when this entity is selected.
   - **Print** – Check this box to check the **To Be Printed** box by default on transactions when this entity is selected.
   - **Fax** – Check this box to check the **To Be Faxed** box by default on transactions when this entity is selected.
4. Click **Save**.

After you save these settings on their record, these boxes are checked by default.

Note: These settings override any customized settings on transaction forms you use.

For more information about printing and emailing transactions, see Printing Checks and Other Transactions and Emailing Transactions.

You can also set values these fields using the Mass Update function. For information, see the help topic Mass Updates.

Printing Checks and Other Transactions

You can print transactions as you enter them, or you can print a group of similar transactions at the same time. You can print transactions in HTML or PDF format. This topic provides general instructions for printing transactions. For information about printing specific transactions or records, see the following help topics:

- Printing Bar Code and Item Labels
- Printing Checks
- Printing Deposit Slips
- Printing Direct Deposit Vouchers
- Printing a Picking Ticket
- Printing a Sales Receipt
- Printing Shipping Labels
- Printing an Invoice

To print PDF files, you must install Adobe Reader. Visit the Adobe website to download the latest version at no charge.

Your administrator can customize the layout of your printed forms using Advanced PDF/HTML templates. For information, see the help topic Advanced PDF/HTML Templates.

If you print using PDF, files open in the default Adobe application. You can also download files and save them to print later. To do this, go to Home > Set Preferences and check the Download PDF Files box.

You can print transactions on blank paper, or you can purchase compatible customized checks and forms from the Forms Fulfillment Center, a NetSuite partner at www.netsuiteforms.com.

Important: If the Multi-Language feature is enabled in your account, you can choose from different languages for printed transactions. However, only the system-supported languages available in user preferences are supported because pre-translated strings are provided for general terms in these languages. Additional languages that are available as company preferences aren't supported for printed transaction forms, but they're supported for website translations. For more information, see the help topic Configuring Multiple Languages.

Note: To be able to print checks and other transaction, you need the View level of the Set Up Company permission.

To print an individual transaction from the transaction form:

1. Open the transaction you want to print in edit or view mode.
2. Click the **Print** icon.

> **Note:** If you use the Multi-Language feature and have customers that use a different language than the one you set at Home > Set Preferences, when you point to the Print icon, you can select **Print in Customer's Locale** to translate the transaction into the customer's predefined language. For more information, see the help topic Configuring Multiple Languages.

3. To print:
   - If you print using HTML, click **Print** on your browser.
   - If you print using PDF, click **Print** in Acrobat Reader.

     If you have the **Download PDF Files** preference enabled at Home > Set Preferences > General, you must save the PDF to your computer and open it from there to print it.

Multiple printing

On each transaction record that you want to print, you must mark the record to be printed. To do this, check the **To Be Printed** box. The location of this box depends on the type of transaction. For example, on the check record, this box appears in the header of the record. For a purchase order, this box appears on the **Messages** subtab.

After you've saved the transaction records, you can print them all at one time.

> **Note:** To access the Print Checks and Forms page, you need the View level of the Print Checks and Forms permission.

To print multiple similar transactions:

1. Go to Transactions > Management > Print Checks and Forms.
2. Click the name of the transaction you want to print.
3. Check the box next to each transaction you want to print, or click **Mark All** to select and print all transactions in the list.

   If the list has multiple segments, use the **From – To** dropdown list to see a different set of records.
4. Click **Print**.

   You can also hover over the print button and select **Print in Customer's Locale** to translate the transaction into the customer's language. For more information, see the help topic Configuring Multiple Languages.
5. When the preview page opens:
   - If you print using HTML, click **Print** on your browser.
   - If you print using PDF, click **Print** in Acrobat Reader.

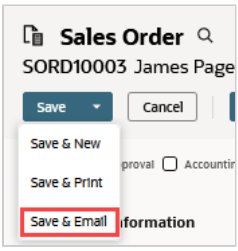
Emailing Transactions

Email is now the main method of sending transactions to customers for most users. With NetSuite, you can email the transaction directly from the active screen. NetSuite automatically saves a copy of the message and records the audit trail. Users with the Email Templates and Custom Transaction Forms permissions can select which transaction email template to use for each transaction type when sending transaction emails with a PDF attachment. For information about determining the content of the email message, see the help topics Working with Email Templates and Assigning an Email Template to a Transaction Type.

You don't need special permissions to email a transaction, but your account needs to be set up to enable the action. An administrator must do the setup. For information, see the help topic Setting Email Preferences.

Following are methods to email a transaction:

- To send the transaction by email as you complete or edit it, select **Save & Email** from the **Save** menu.



  Save & Email verifies that the **To Be E-Mailed** box is checked and the field contains an email address. The box and field are located on the **Communication** > **Messages** subtab of the transaction record.

  The **To Be E-Mailed** box must be checked and the field must contain an email address. If the field is blank, NetSuite prompts you to provide an email address. If the field contains an email address, the **Save & Email** method immediately saves the transaction and sends an email message with the transaction.

  The default address in the **To Be E-Mailed** field is the email address specified in the header of the customer or vendor record. The box is automatically checked when the **Email** box is checked on the **Preferences** subtab of the entity record.

  You can view a log of sent transaction email, including any attachments in the entity record on the **Communication** > **Messages** subtab. A list of sent email is also available in the same location on the transaction record. To view the list, your role must have at least View level access to the Track Messages permission, and meet one of the following criteria:

  - you're the author, the recipient, or a related entity
  - you have access to the author, the recipient, or a related entity
  - or you've access to a related record, such as a transaction, event, or custom record.

  For information about how to set up a history log of all recently sent transaction email, see Creating a Sent Log for Transaction Email.

- To send the transaction to one or more specific email addresses, go to the **Communication** > **Messages** subtab, check **To Be E-Mailed**. Enter the email address you want to send the transaction to. Separate multiple addresses with semicolons. Optionally, you can select a standard message from the **Select Message** list or type a message in the **Customer Message** field.

To send a saved transaction by email in view mode, from the **Actions** list, select **Email**.

Note: Transactional email isn't subject to monthly send limits. You can send an unlimited number of transactional email messages during the month.

Warning: To send a bulk e-mail with a mass update on a transaction, don't exceed the 4000 character limit for the field (including HTML tags), otherwise, the e-mail doesn't save.

Sending Transaction Email in Bulk

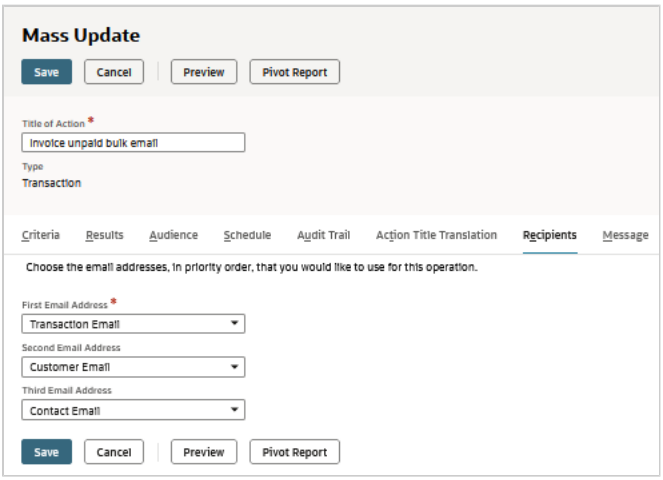
Sending transaction email in bulk is useful if, for example, you want to send reminder email for multiple transactions for which payments haven't been received. You enter search criteria to generate a list of transactions and then select which transactions you want to send email for.

To send transaction email in bulk:

1. Go to Lists > Mass Update > Mass Updates.
2. Click **Transactions** to expand the mass update options.
3. Click **Bulk Email**.

   The Mass Update page opens.
4. On the **Criteria** subtab, define the transactions you want to send email for using the **Filter** dropdown list. For example, you can create a list of all unpaid invoices by doing the following:
   a. Select **Type** in the **Filter** column.
   b. In the popup window, select **Invoice**, and click **Set**.
   c. In the next row, select **Status** in the **Filter** column.
   d. In the popup window, select **Invoice:Open**, and click **Set**.
5. On the **Recipients** subtab, select which email address to use and the order in which the email fields are searched.

   For example, in the screenshot below NetSuite first searches for an email address in the transaction record. If it doesn't find one, it checks the customer record. If there's still no email address, it uses the address in the contact record.



   Transaction Email is the email field that appears on the Communication subtab of a transaction such as a sales order.

   Customer Email is the email field on the main Customer record page.

   Contact Email is the email address related to the named contact within the company.
6. On the **Message** subtab of the Mass Update form, select the scriptable template you want to use or enter the text for the message in the **Message** field. Templates can be up to 4 MB in size.

   > **Tip:** You can generate bulk transaction email from scriptable templates and include attachments. Scriptable templates use a combination of HTML and FreeMarker code. Scriptable Templates.
7. Do one of the following:
   - Click **Preview** to view a list of transactions that match your search criteria.
   - Click **Save** to save this mass update to use later.

   When you click **Preview**, the Mass Update Preview Results page opens with a list of the transactions that match your criteria.

8. In the **Apply** column check the transactions for which to send email.
9. Click **Perform Update**.

   A status page opens that displays progress and completion information.

You can create a simple saved search to check what email has been sent to a particular entity. For more information, see Creating a Sent Log for Transaction Email.

Creating a Sent Log for Transaction Email

You can keep track of what email has been sent to a particular entity by looking at the log found in the Communication > Messages subtab of that record. You can also view a log of all recently sent transaction email messages by creating a simple saved search. For example, you might want to check that a bulk mailing of invoices was successfully delivered to their recipients.

To create a sent log for bulk transaction email:

1. Go to Lists > Search > Saved Searches > New.
2. Select **Message**.
3. From the **Filter** dropdown list, add the following:
   a. **Date** – Specify the required date range for the search.
   b. **Subject** – Add any text which the transaction email is likely to contain in the subject header, for example "invoice".
   c. **Attachment Fields** – Select **File Type** and specify what type of file was attached to the transaction mail, for example PDF.
4. Click the **Preview** button to check the search returns the results you want.
5. Add a Search Title and check the **Public** box if you want to make this search available to other users.
6. Click **Save**.

Transaction Detail Report

A Transaction Detail report lists, in chronological order, all transactions entered during a specific time period. Both posting and non-posting transactions are included.

To view this report, your role must include the Transaction Detail report permission.

The report includes the following columns:

- **Type** - the type of transaction
- **Date** - transaction date
- **Document Number** - a reference number (like an invoice number)
- **Name** - a name (of a vendor, customer or employee)
- **Memo** - a memo
- **Account** - the general ledger account associated with the transaction
- **CLR** - a notation whether the transaction has cleared your bank account
- **Split** - the other account involved in the double-entry bookkeeping notation. If more than one account was used to offset this distribution, you see the notation -Split-.
- **QTY** – the quantity
- **Amount** - amount (the transaction amount or transaction line amount)

To see a Transaction Detail report:

Go to Reports > Financial > Transaction Detail.

When you run the report, you'll see a message and a status bar showing the loading progress. You can click Cancel Report to stop the report from loading.

Transaction Detail Workbook Overview

SuiteAnalytics Workbook offers many workbook and dataset templates, each with predefined source data, criteria, pivot tables, and charts.

This section covers the SuiteAnalytics Transaction Detail workbook in NetSuite. For more information about SuiteAnalytics Workbook, see the help topic Workbook and Dataset Templates.

- Transaction Detail Dataset
- Transaction Detail Workbook

Transaction Detail Dataset

This template combines fields from the Transaction and Transaction Line record types to list all transactions entered during a specific time period. It forms the source data for the Transaction Detail Workbook.

Dataset Configuration

The Transaction Detail dataset combines fields from two record types and multiple criteria filters. To edit the dataset, see the help topic Defining a Dataset.

Root Record Type	Joined Record Type	Custom Formula Fields	Data Grid	Criteria Filters
Transaction	Transaction Line	(none)	The following fields are included in the dataset. Transaction: ▪ Date ▪ Internal ID ▪ Transaction ▪ Type Transaction Line: ▪ Amount (Transaction Currency) ▪ Entity ▪ Memo ▪ Subsidiary	The following criteria is used to filter the dataset: ▪ **Transaction: Date** on or after start of this month ▪ **Transaction Accounting Line: Amount (not consolidated)** isn't empty ▪ **Transaction Accounting Line: Accounting Book** is Primary Accounting Book ▪ **Account: Type** none of <NO VALUE>, Non Posting

If using Multi-Book Accounting, the Primary Accounting Book filter is also included by default.

Transaction Detail Workbook

The Transaction Detail Workbook for SuiteAnalytics Workbook by default includes the same fields as the Transaction Detail Report in NetSuite, but you can add more data if you need to. The report lists, in

chronological order, all transactions entered during a specific time period. Both posting and non-posting transactions are included.

As with all standard workbooks, only Administrators can access the Transaction Detail Workbook.

This workbook includes the following pivot tables:

- **Transaction Overview** — The default definition includes a row for account type and a Transaction Count measure and a grand total of all accounts.
- **Account Turnover** — For OneWorld accounts. The default definition includes a row for Account, a Subsidiary column, and Amount (Sum) measures.

My Transactions Workbook

SuiteAnalytics Workbook offers many workbook and dataset templates, each with predefined source data, criteria, pivot tables, and charts.

This section covers the SuiteAnalytics Transaction Detail workbook in NetSuite. For more information about SuiteAnalytics Workbook, see the help topic Workbook and Dataset Templates.

- My Transactions Dataset
- My Transactions Workbook

My Transactions Dataset

This dataset uses fields from the Transaction record type so that you can see all of the transactions you've created within the last year. It forms the source data for the My Transactions Workbook.

Key Field Differences

If you create a saved search to obtain this information, all the required fields are available through the transaction record type in the Saved Search application.

The following table lists key differences between the saved search and the dataset:

Field Name in Saved Search	Record Location in SuiteAnalytics Workbook	Join Path in SuiteAnalytics Workbook	Field Name in SuiteAnalytics Workbook
Date	Transaction	Transaction	Date
Name	Transaction	Transaction	Entity
Document Number	Transaction	Transaction	Document Number/ID
Memo	Transaction	Transaction	Memo
Period	Transaction	Transaction	Posting Period
Status	Transaction	Transaction	Status
Amount	Transaction	Transaction	Total Amount (Transaction Currency)
Transaction Name	Transaction	Transaction	Transaction
Type	Transaction	Transaction	Type
Currency	Transaction	Transaction	Currency

Dataset Configuration

The My Transactions dataset uses fields from the Transaction record type and two criteria filters. To edit the dataset, see the help topic Defining a Dataset.

Consider the following information before you edit the dataset:

- If you enable the Multi-Book Accounting feature for your account, you can use the Accounting Book field in a criteria filter to view data for specific accounting books.
- To access the Accounting Book field, use the join path Transaction > Transaction Line > Transaction Accounting Line.

Root Record Type	Joined Record Type	Custom Formula Fields	Data Grid	Criteria Filters
Transaction	(none)	(none)	The following fields are included in the dataset: Transaction: ▪ Date ▪ Entity ▪ Internal ID ▪ Memo ▪ Posting Period ▪ Status ▪ Total Amount (Transaction Currency) ▪ Transaction ▪ Type	The following criteria is used to filter the dataset: ▪ **Created By** is me ▪ **Date** within previous one year

My Transactions Workbook

This workbook is based on the My Transactions dataset and displays all transactions you've created within the last year by default.

Customize views with additional filters and data by modifying the workbook template and dataset template. You can choose to visualize the data as a table, chart, or pivot. The dataset template is based on the transaction record.

As with all standard workbooks, only Administrators can access the My Transactions workbook.

The workbook includes the following pivot tables:

- **Summary by Currency** - Displays transactions by type, currency, and status
- **Summary by Period** - Displays a count of transactions by type and posting period

Use the Summary by Currency pivot table to search for specific transactions. You can also use the status information to identify the next workflow steps for transactions, such as for period closing.

Use the Summary by Period pivot table to report on user or team performance during each period and by transaction type.

To access the workbook, click the **My Transactions** link from the Workbook Templates list on the Workbooks subtab of the Analytics Home page.

Limits for Display of Transaction Lists and Sublists

When working with transactions in NetSuite, you can only access up to 10,000 records, transactions, or rows of data at a time. This limit applies to all transaction types unless otherwise stated. For example, the maximum number of lines that can appear on a transaction record's sublist is 10,000.

Warning: Transactions with more than 1,000 lines may negatively affect NetSuite's performance or cause timeouts.

For example, if you know that you have more than 10,000 invoices, use the Customize button on the sublist to filter the invoices that are listed. For example, when working with the Credit Memo record, you can click the Customize button on the Apply sublist to narrow the list of invoices.

For more information about transaction line limits, see Line Limitations for Transactions.

Note: The limits for submitting transactions are different from the limits for displaying them. The limit for transactions submitted through the user interface is 500 lines per transaction. For transactions submitted through CSV import or SOAP web services, the limit is 5,000 lines per transaction.

For journal entries, these limits are 1,000 lines for the user interface and synchronous SOAP web services, and 10,000 lines for CSV import and asynchronous SOAP web services.

Line Limitations for Transactions

In NetSuite, there are specific limitations for lines when working with transactions. You should follow these limitations, otherwise the system may not perform the requested action. The line limitation applies to creating transactions, importing transactions (CSV, SOAP, REST, user interface, and SuiteScript), and displaying transactions.

See one of the following tables with specific line limits for different transaction interactions:

- Limitations for Creating Transactions
- Limitations for Importing Transactions
- Limitations for Displaying Transactions
- Entering Transaction Line Items

Limitations for Creating Transactions

When creating a transaction, the total number of lines per transaction shouldn't exceed the following limits:

Warning: Transactions with more than 1,000 lines may negatively affect performance or cause timeouts.

Type of Transaction	Line Limit	Details
Expense Allocation Schedules	10,000	Creating Expense Allocation Schedules
Journal Entries	200	Journal Entries
Revenue Recognition Journal Entry	1,000	Generating Revenue Recognition Journal Entries

Type of Transaction	Line Limit	Details
Merge Revenue Arrangements	10,000	Combination and Modification of Performance Obligations
Generating Revaluations	2,000	Generating Revaluations
Reclassification Journal Entries	1,000	Creating Reclassification Journal Entries
Journal Entry Allocation	200	Allocating Paycheck Expenses to Projects
Invoices	200	Invoices
Sales Orders	500	Sales Orders
Software Vertical Contract Renewals	10,000	Contract Renewals Best Practices
SuiteTalk SOAP Web Services Transactions	200	Usage Notes for Transaction Record Types
Custom Actions using the Workflow Action script	100,000,000	Custom Action

Limitations for Importing Transactions

To maintain performance, when you import transactions, the total number of lines per transaction shouldn't exceed the following limits:

Warning: Transactions with more than 1,000 lines may negatively affect performance or cause timeouts.

Type of Transaction	CSV Import	SOAP Import	NetSuite Application Import [1]	Details
Transactions	5,000	5,000	500	Transactions Import Type
Software Vertical Contract Renewals	5,000	5,000	500	Contract Renewals Best Practices
Single Inventory Worksheet Import	1,000	—	—	Single Inventory Worksheet Import
Sales Orders	—	1,000	—	Sales Orders
Journal Entries	10,000	10,000	10,000	You may notice a performance impact during import and in the user interface for journal entries with over 1,000 lines. For more information, see the help topic Making Journal Entries
Intercompany Journal Entries	10,000	10,000	—	Intercompany Journal Entry Body and Sublist Fields

[1] There are few types of records where you can import from record-specific pages outside of the CSV import, such as the Translation Collections where you can import and export XLIFF files.

Limitations for Displaying Transactions

When working with transactions in the NetSuite UI, the number of records, transactions, or rows of data that can be accessed at one time shouldn't exceed the following limits:

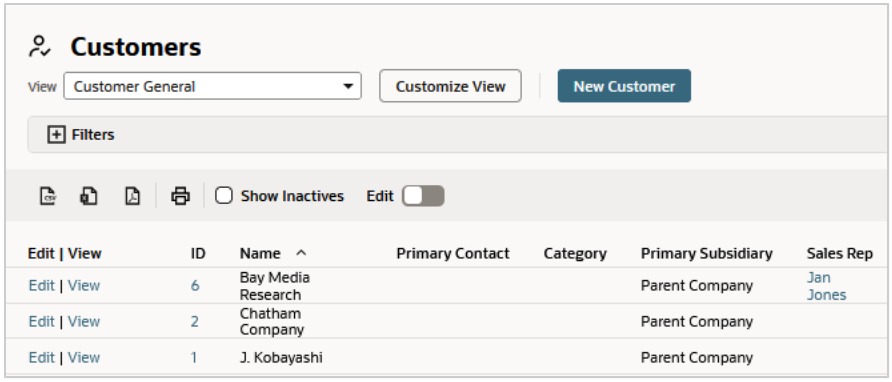
Warning: Transactions with more than 1,000 lines may negatively affect performance or cause timeouts.

Type of Transaction	Line Limit	Details
Transactions	10,000	Limits for Display of Transaction Lists and Sublists
Sublists on iPhone records	300	Working with Sublists
Software Vertical Contract Renewals	10,000	Contract Renewals Best Practices
Gross Requirements Inquiry	1,000	Gross Requirements Inquiry
Generate China VAT Transactions	10,000	Known Limitations of NetSuite China Localization
China Subledger Report	5,000	Known Limitations of NetSuite China Localization
China Cash & Bank Journal Report	5,000	Known Limitations of NetSuite China Localization

Working with Lists

You can use NetSuite lists to access individual records or to work with multiple records at one time. The location and access of lists of records depends on the role you use to log in. Only the Administrator role has access to all record types. For more information about permissions, see the help topic NetSuite Permissions Overview.

To access lists of records, go to Lists tab and select a relevant list.



You can do the following with most lists:

- Select a preconfigured view from the View list or click Customize View to create your own. See Working with List Views, Sublist Views, and Dashboard Views.
- Click a button near the top to create a new record to add to the list, New Customer in this example.
- Expand the Filter area to show and use the filters provided.
- Select an option from the Style dropdown list.
- Use the controls in the row at the top of the list to do the following:
  - Click one of the export icons to export the list as a CSV, Microsoft Excel, or PDF file.
  - Click the print icon to print the list.

  - Check the Show Inactives box to see inactivated records.
  - Select an option in the Quick Sort list.
  - Large lists of records may be broken down into smaller sections. Use the dropdown list to see a different page of records. Use the left and right arrows to move forward and back in the list.
- Click a column heading to sort the list by that column.
- Click Edit next to a name to make changes to the record.
- Click View or the name to view the record.

In NetSuite, you can also use customization tools to create your own components, including lists. For more information, see the help topic Customization Overview.

When the Inline Editing feature is enabled, click the Edit switch in the list toolbar to edit fields directly in the list. Inline Editing is available on the following lists:

- Campaigns
- Cases
- Contacts
- CRM Tasks
- Customers
- Employees
- Events
- Issues
- Items
- Leads
- Partners
- Phone Calls
- Projects (Jobs)
- Prospects
- Solutions
- Transactions
- Vendors

For more information, see Using Inline Editing.

For more information about filling in the fields on a record page, see NetSuite Record Pages.

Exporting Lists

You can export NetSuite lists as files that you can open in external applications. The toolbar at the top of the list has icon buttons to support the following file export types:

- Click (Export - CSV) to export results to a CSV file.
- Click (Export - Microsoft® Excel) to export results to an XLS file.
- Click (Export - PDF) to export results to a PDF file.

Note: If your account administrator enabled the Tableau® Workbook Export feature and assigned you the corresponding permission, your list toolbar also contains the Export to Tableau Workbook icon .

For results exported to a CSV or XLS file, you may save the file or open it immediately in Microsoft Excel. For results exported to a PDF file, the file opens immediately.

NetSuite generates Internal ID values for each record. These values, which serve as unique identifiers, are always included as a results column in the list to be exported.

Each export format has advantages and limitations. Review the limitations before selecting a preferred format. The format you select can affect data accuracy and report readability. For details on the export formats and their limitations, see Comparing Export Formats.

Note: If exported lists and files are marked as encrypted or read-only, you need to know your password for such files.

Known Excel Limitation for Values with More Than 16 Digits

When you open a CSV file directly, Excel treats long numeric sequences as numbers and displays them using scientific notation. This causes a loss of precision when the number has more than 16 digits and to lost information when digits beyond position 16 are truncated. Even when the text is qualified by apostrophes or double quotes, it's recognized by Excel as a number. To avoid this limitation, open CSV files using the Excel multistep Text Import Wizard. The wizard enables you to set column formatting in the last step ("Text" format).

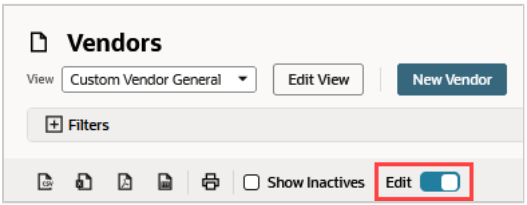
Using Inline Editing

Inline list editing enables you to update records quickly by changing data directly in a record's row on the list page. This makes editing faster and easier since you don't have to open each record to make changes. You can also edit multiple records simultaneously by using keyboard commands. You can't edit addresses on list pages with inline editing.

Inline list editing is available when the Inline Editing feature is enabled. To enable the feature, go to Setup > Company > Enable Features. On the Company subtab in the Data Management section, check the Inline Editing box and click Save.

To use inline editing:

1. Use the **Edit** switch at the top of the page to turn on inline editing. When editing is off, the switch displays an x. When editing is on, the switch has a green check.



The list page refreshes to display an edit icon in each column header that contains editable fields. You can also identify editable fields by placing the cursor on them. A field is editable if the cursor turns into a hand when on the field.

> **Important:** Display types affect whether fields are available for editing or not. For more information, see the help topic Setting Display Options for Custom Fields.

> **Important:** Columns that display an edit icon in the header may include field values that aren't available for the inline editing due to data validation that prevents editing generally. The edit icon doesn't mean that you can use inline editing for every field in the column.

2. Click the field where you want to enter or change information.
3. Click away from the field to save your changes.

The data is automatically saved on that record.

Use the following keystrokes to move among editable fields:

- Press Tab to move right.
- Press Shift+Tab to move left.
- Press Shift+Enter to move up.
- Press Enter to move down.
- Press Alt+X to edit the first editable field on the page.
- Press Ctrl+Z to revert the value in a field back to the previous value.
- Press Esc when you're done editing a field to save the new value and close the field.

You can also use the following tools to increase your data entry performance when inline editing is enabled:

- Edit the same field on multiple records by pressing Ctrl and holding it as you select multiple fields.

  > **Note:** Note that you can only edit multiple fields in the same column. You can't edit multiple fields across different columns at the same time.

- Click **Add** above the list to open a Quick Add popup window for the current record type.
- Click the icon in the **New** column to open menu of related records. Select an option to create the new record on a separate page. The icon appears when you move your pointer over the column.

If you change many field values in one session using inline editing, NetSuite may have to update multiple records simultaneously. In this case, you may receive the following message: "Too many inline edits. Please wait a few seconds and try the edit again." You should be able to complete your most recent edit after a brief wait.

For more detailed information and considerations related to inline editing, see Additional Notes about Inline Editing.

Additional Notes about Inline Editing

See the following additional notes about using inline editing:

- Edit and Customize List Views
- Limitations for Inline Editing on Referenced Fields
- Additional Setup Option for Custom Search Portlets
- Allow Editing Option for Custom Records Is Unrelated

- Inline Editor Sublist Tooltip

Edit and Customize List Views

You can customize the list view to display certain fields from a record type on the list page. For more information, see Customizing List Views. Note that if the Use Expressions option is enabled for a search, inline editing is disabled in list, dashboard, and sublist views based on the search. If you want inline editing to be available for a view, ensure that the Use Expressions box on the Criteria subtab isn't checked for the search that filters view results. See the help topic Using Expressions in Search Criteria.

Limitations for Inline Editing on Referenced Fields

If a field on a record is referred to by a formula custom field, you can't edit the referenced field with inline editing. For more information about sourcing, see the help topic Creating Formula Fields.

Additional Setup Option for Custom Search Portlets

When the Inline Editing feature is enabled, editing is available by default for all search results in dashboard portlets. However, each Custom Search portlet has an Allow Edit setup option that you can use to enable or disable the Edit feature for specific portlets. See the help topic Displaying Saved Search Results in Dashboard Portlets.

Allow Editing Option for Custom Records Is Unrelated

Each custom record type created in NetSuite has an Allow Editing option that is different from the general editing that is available when the Inline Editing feature is enabled. When enabled, the custom record type option permits records of this type to be edited directly when they display in a sublist on a parent record. Enabling this option doesn't control whether records of this type can be edited inline in their own list pages and views. This option isn't related to the Inline Editing feature or to the Edit buttons that display on list pages when the feature is enabled.

Inline Editor Sublist Tooltip

When you're editing a sublist inline and you hover over a cell, the tooltip appears and shows the column name. If a sublist has many lines, you can view the column name when scrolling down the sublist.

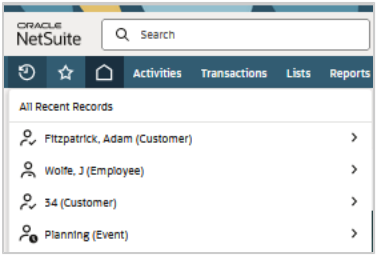
You can enable or disable the tooltip by checking or clearing the **Sublist Column Name Tooltip** box which is located on the Appearance subtab at Home > Set Preferences.

Using the Recent Records Menu

NetSuite offers two ways to view a list of records you recently accessed.

Hover over the Recent Records icon , to see a list of records you recently viewed or edited. This is the Recent Records menu. From here you can click a link to open a record in view mode, or move your cursor

over the link and click Edit to open the record in Edit mode. You can also click **All Recent Records** to view a list of the 100 most recent records. This list includes the record type and the last date you accessed it.



You can also create a **Recent Records portlet** on your dashboard to show the last 12 records you viewed or edited. Click Personalize Dashboard (under the tabs at the top of your dashboard) and then select Recent Records in the Add Content panel.

The difference between using the Recent Records menu and the Recent Records portlet is that the portlet constantly displays a list of recent records on the dashboard. The menu only displays recent records on demand, when you click or hover over the icon.

Working with List Views, Sublist Views, and Dashboard Views

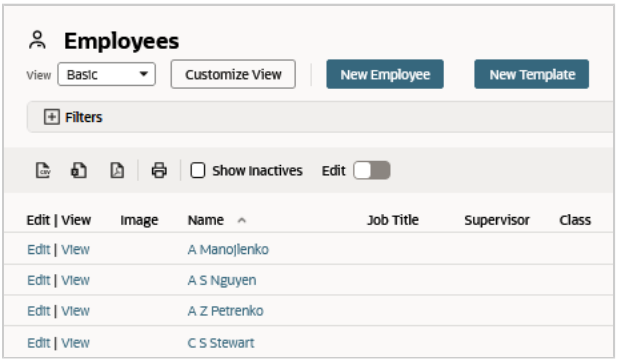
NetSuite provides you with several different options for viewing lists of records in your account, including the following:

- List View
- Sublist View
- Dashboard View

List View

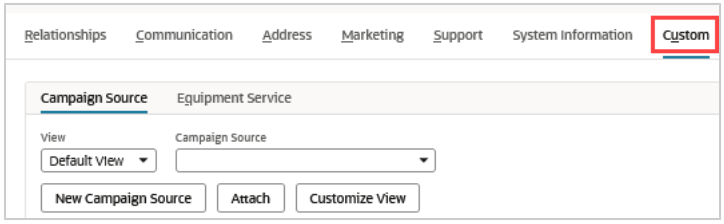
The list view is displayed when you go to the NetSuite tab that lists the record you want, and click the task link for that type of record. You can customize this view by changing the fields that display on the list page. A customized view is based on a custom search that you create for that record type.

To customize a list view, click Customize View or Edit View. Note that the Edit View button only appears when you've already customized the list view. For more information, see Customizing List Views.



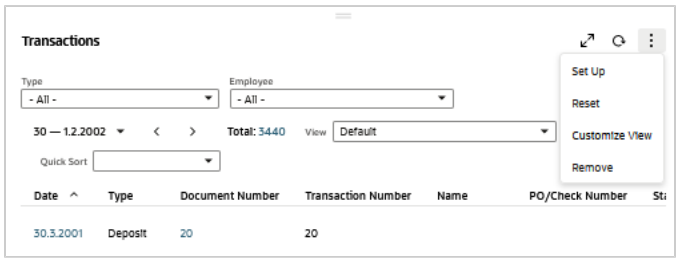
Sublist View

Most records include subtabs that display additional fields or lists of other records. You can create a separate customized sublist view that displays different data than a list view. For more information, see Customizing Sublist Views.



Dashboard View

You may choose to display a list of records in a portlet on your dashboard. NetSuite enables you to create a separate customized view for list portlets on your dashboard. For more information, see Customizing Dashboard Views.



Your existing list, sublist, and dashboard views may be based on preferred view settings specified by your administrator or by another user with Publish Search permission, rather than on system-defined defaults. For information about how preferred view settings are defined, see the help topic Using a Saved Search as a View.

Customizing List Views

You can customize the list view for most record types. Customizing the list view enables you to change the columns displayed in the list and select the filter options available in the footer of the list page.

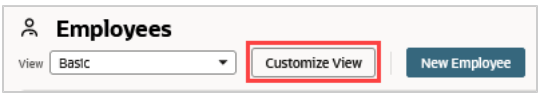
You can create custom views for any list that includes the Customize View or Edit View button on the list page.

If a saved search has been made available as a list view, you can select that saved search as your list view instead of customizing a new one. These searches are available from a View dropdown list. See Selecting an Existing Saved Search as a Custom View.

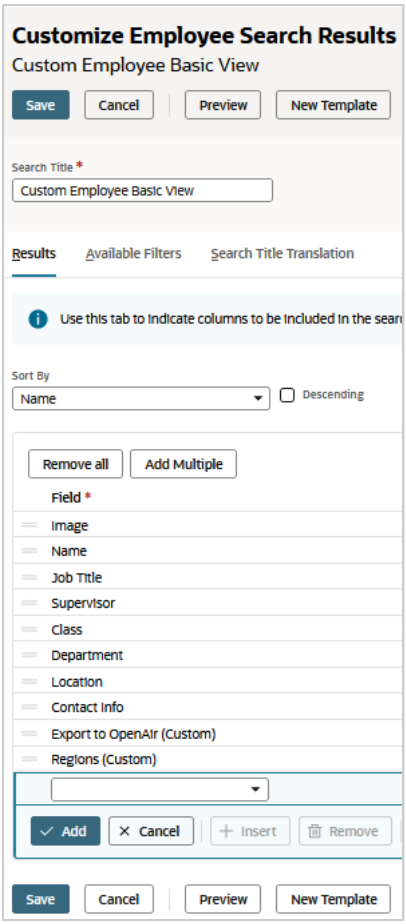
To create a custom view for lists:

1. On the list page you want to customize, click **Customize View** or **Edit View**.

   If you haven't previously customized the list view, the **Customize View** button is displayed. If you have customized the view, the **Edit View** button is displayed. In the example below, the Customers & Jobs page has **Customize View** button.



Clicking Customize View takes you to the page to customize the view.



2. In the **Search Title** field, enter a different name for your custom view if needed.

   Default search title is the word Custom followed by the record type and the selected view, for example, Custom Customer General View.

3. On the **Results** subtab:
   - Select a different field to use for sorting if desired.
   - Add, remove, and move fields as desired.
   - Enter custom labels for fields as desired. The default label is the field name.
4. On the **Available Filters** subtab:
   - Add, remove, and move fields to be displayed as filter lists on the list page.
   - Enter custom labels for filter lists as desired. The default label is the field name.
   - Leave the **Show in Filter Region** setting as **Yes** for all fields. If you change this setting to **No**, the filter list isn't displayed.
5. When you've finished making changes, click **Save**. This customized view is now used for the selected record type's list page.

   You also can do the following:

- Click **More Options** to display a full saved search definition page where you can edit other options, such as filter criteria.

  Note that if you make changes to other options on this page, these settings are preserved when you return to the customization page even though they're no longer visible.
- Click **Cancel** to return to the list page, with no changes.
- Click **Restore Defaults** to return to the list page that uses your previously defined preferred search settings, if any, or system-defined defaults.

  Note that this button only displays after you've customized the list view.

Customizing Sublist Views

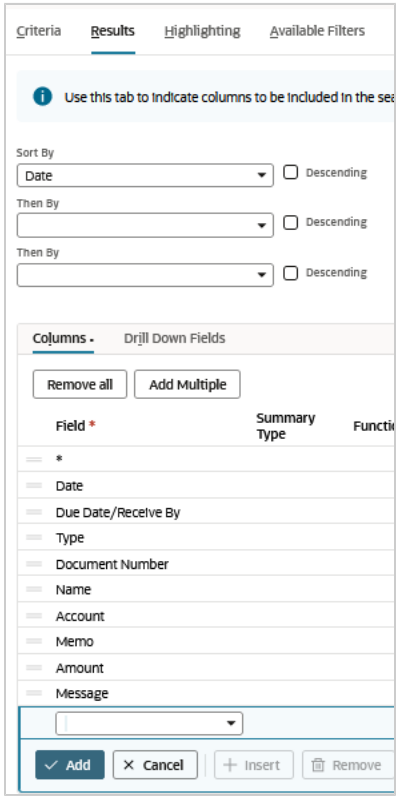
You can customize most of the views used for a list that appears on record's subtabs. Available customizations include changes to displayed results columns and filter dropdown lists.

> **Note:** If an existing saved search is available as a sublist view, you can select that search to customize your subtab view instead of creating a new one. These searches are available from a View list. See Selecting an Existing Saved Search as a Custom View.

> **Note:** When you switch between custom views on a sublist, the filters on the sublist don't update automatically. For more information, see SuiteAnswers article Switching Between Custom Views on a Sublist doesn't Automatically Update Filters.

To create a custom view for a sublist:

1. On the sublist you want to customize, click **Customize View**.



2. In the **Search Title** field, you can enter a different name for your custom view.

   Default search title is the word Custom followed by the record type and the selected view, for example, Custom Item Transaction Sublist View.
3. On the **Criteria** subtab, add a **Filter**, if needed.
4. On the **Results** subtab:
   - Select a different field to use for sorting if needed.
   - Add, remove, and move fields as needed.
   - Enter custom labels for fields as needed. The default label is the field name.
5. On the **Available Filters** subtab:
   - Add, remove, and move fields to be displayed as filter lists on the list page.
   - Enter custom labels for filter lists as needed. The default label is the field name.
   - Leave the **Show in Filter Region** setting as **Yes** for all fields. If you change this setting to **No**, the filter list isn't displayed.
6. When you've finished making changes, click **Save**. This customized view is now used for the selected record type's sublist.

   You also can do the following:
   - Click **More Options** to display a full saved search definition page where you can edit other options.

     Note that if you make changes to other options on this page, these settings are preserved when you return to the customization page even though they're no longer visible.
   - Click **Cancel** to return to the record that includes the sublist, with no changes.
   - Click **Restore Defaults** to return to the sublist that uses your previously defined preferred search settings, if any, or system-defined defaults.

     Note that this button only appears after you've customized the sublist view.

Customizing Dashboard Views

You can customize the view used for a record type's lists in dashboard List portlets. Available customizations include changes to displayed results columns and filter dropdown lists. This is different from personalizing dashboards, which refers to changing the portlets on the dashboard.

> **Note:** If an existing saved search is available as a dashboard view, you can select that search to customize your dashboard view, instead of creating a new one. These searches are available from a View dropdown list. See Selecting an Existing Saved Search as a Custom View.

To create a custom view for list portlets on dashboards:

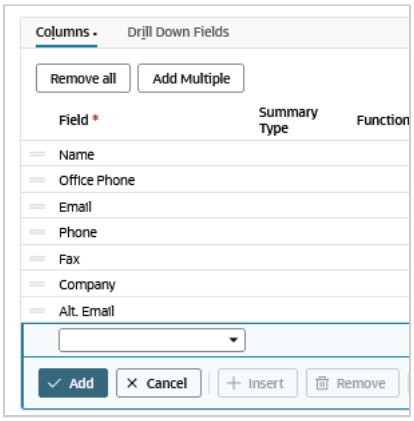
1. In the List portlet that display the dashboard list you want to customize, click the **Customize View** or **Edit View** link.

   If you haven't previously customized the dashboard view of this record type, the **Customize View** link is displayed. If you've edited it, the **Edit View** link is displayed.
2. In the **Search Title** field, enter a different name for your custom view, if needed.

   Default search title is the word Custom followed by the record type and the selected view, for example, Custom Item Basic View.

3. On the **Results** subtab:
   - Select a different field to use for sorting if needed.
   - Add, remove, and move fields as needed.

     Note: A List portlet displays only the first 7 columns when the portlet is placed in the center of the dashboard and only 2 when it's on the side.



   - Enter custom labels for fields as needed. The default label is the field name.
4. On the **Available Filters** subtab:
   - Add, remove, and move fields to be displayed as filter lists on the list page.
   - Enter custom labels for filter lists as needed. The default label is the field name.
   - Leave the **Show in Filter Region** setting as **Yes** for all fields. If you change this setting to **No**, the filter list isn't displayed.
5. When you've finished making changes, click **Save**. This customized view is now used to display the selected record type in List portlets.

   You also can do the following:
   - Click **More Options** to display a full saved search definition page where you can edit other options, such as filter criteria.

     Note that if you make changes to other options on this page, these settings are preserved when you return to the customization page, even though they're no longer visible.
   - Click **Cancel** to return to the page displaying the List portlet, with no changes.
   - Click **Restore Defaults** to return to the page with the List portlet that uses your previously defined preferred search settings, if any, or system-defined defaults.

     Note that this button only appears after you've customized the list view.

Selecting an Existing Saved Search as a Custom View

An administrator or another user with the Publish Search permission can make an existing saved search available as a list view, a sublist view, and a dashboard view. This enables you to select this search from a View dropdown list to customize your view, instead of clicking Customize View and creating your own.

If you don't see a View list, it means that no saved searches of that record type have been set as available for that type of view.

The following screenshot shows the View list for a dashboard view:

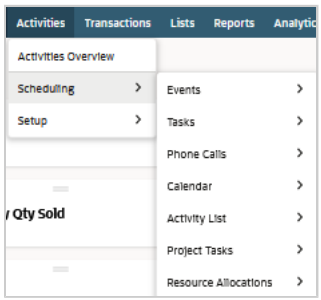
For information about how saved searches are made available as custom views, see the help topic Using a Saved Search as a View.

You can customize how saved search results are printed if your site uses advanced PDF/HTML templates. For more information about creating a custom template to print results from saved searches, see the help topic Advanced Templates for Printing Saved Search Results.

Important: If the **Use Expressions** option is enabled for a search, editing is disabled in list, dashboard, and sublist views based on the search. If you want editing to be available for a view, ensure that the **Use Expressions** box on the **Criteria** subtab isn't checked for the search that filters view results. See the help topic Using Expressions in Search Criteria.

Working with Your Calendar and Activities

The calendar and activities features in NetSuite help you to make the most of your work time. Use the calendar to manage your activities, including events, tasks, and phone calls. You can get to the calendar from the Activities tab.



You must set preferences before you start using your calendar and activity records in NetSuite. For more information, see Personal Preferences for Activities.

Read Using Your Calendar to learn how to set preferences for sharing your calendar with others in your organization and how to synchronize your calendar using NetSuite for Outlook.

You can set up several calendar portlets on your Activities page to display combinations of personal, group, or team calendars. Each portlet works independently, so you can also display different time frames for the same calendar. For example, you may set a monthly overview portlet on the left of your screen and in the center, a weekly view. See the help topic Calendar Portlets.

When you use the Time Tracking for CRM feature, you can track time on tasks, phone calls, events, and cases. Tracking time on these activities can help you become more aware of how much time is spent on certain projects.

Note: You also need the ability to track time in NetSuite for Time Tracking for CRM.

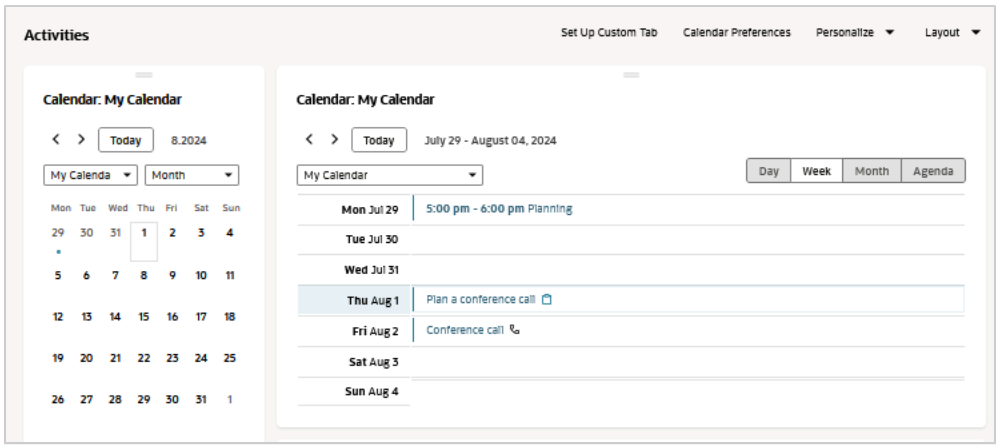
The topics below provide more information about working with your calendar and activities:

- Working with Events describes how to create and edit events, as well as how to track time on event records.
- Working with CRM Tasks describes how to create CRM tasks and Project tasks, as well as how to track time on CRM tasks.
- Working with Phone Calls describes how to schedule phone calls, track time on phone calls, and use telephony with NetSuite.

Using Your Calendar

NetSuite lets you manage your schedule using a calendar you can customize. The Activities page displays events you create in NetSuite automatically on your calendar.

To display tasks and phone calls on your calendar, check the Reserve Time box on task and phone call records, and then enter the start and end times.



Read the following topics for information about how to set up and use your NetSuite calendar:

- Setting Your Calendar Time Zone describes how to share events and meetings with your co-workers across the country or around the world.
- Setting Calendar Preferences describes how to make appointments visible on your calendar and how to share your calendar with other NetSuite users in your organization.
- Navigating Your Calendar describes how to best use the calendar page.
- Synchronizing Your Calendar describes how to use the NetSuite for Outlook client for viewing your appointments and making changes to your schedule without logging in to NetSuite. You must use the Outlook Integration feature to take advantage of this functionality.

Setting Your Calendar Time Zone

The first step in setting up your NetSuite calendar is to make sure your calendar reflects the time zone in which you work. The time zone you choose affects events and the data returned by reports and searches for date fields with timestamps.

To set your Calendar Time Zone:

1. Go to Home > Set Preferences.
2. On the **General** subtab, in the Time Zone field, select your time zone
3. Click **Save**.

The next step in setting up your calendar is Setting Calendar Preferences.

Setting Calendar Preferences

Before you start working with your Activities page, you must set preferences for how you want to use your calendar. These preferences determine the following about your calendar:

- privacy settings
- calendar display
- sharing

Before you set your calendar preferences, set the time zone to make sure your calendar reflects the time zone in which you work. For more information, see Setting Your Calendar Time Zone.

To set your calendar preferences:

1. Click the **Activities** tab.
2. In the page header, click **Calendar Preferences** to view the Personal Calendar Setup page.
3. In the **Title** field, enter a name for your calendar.

   Only you can see this title. If you give others access to your calendar, they see your name when viewing your availability.
4. Use the **Sharing** field to set preferences for access to your calendar. Note that you can choose a different Event Access setting on individual event records.
   - **Public** – This gives everyone in your company access to your calendar.
   - **Private** – This restricts everyone in your company from seeing your calendar.
   - **Defined Below** – This lets you select who can view and schedule appointments on your calendar using the Calendar Access subtab. For details, see Calendar Access.
5. If you choose **Defined Below** in the **Sharing** field, click the **Calendar Access** subtab to select the people you want to give access to your calendar.
6. Click **Preferences** to choose a default view for your calendar, set your time preferences, and enable sharing with iCal-compatible devices and applications. For details, see Preferences.
7. After you've set all your preferences, click **Save**.

Calendar Access

Use the Calendar Access subtab to define how your events appear when others in your NetSuite account view your calendar.

1. In the **Grant Access to** column, select who should have access to your calendar. Only NetSuite users with login access to your account appear in this list.
2. In the **Access Level** column, choose one of the following access levels:
   - **View** – This person can see events you mark public and busy times for events you mark as busy.
   - **Edit** – This person can see, change and remove events you mark public and see busy times for events you mark as busy. They can't delete events from your calendar.
   - **Full** – This person has view and edit access to public events on your calendar, can delete events from your calendar and also accept events on your behalf.
   - To grant access to your private events, check the **Can Access Private Events** box for the selected NetSuite user.
3. Click **Add**.

   Note: Administrators can view, edit, or delete any task, event, or call, even if it's not assigned to them and regardless of the event access settings.

Preferences

The options on the Preferences subtab determine how the calendar looks when you're logged in to NetSuite. You can choose a daily, weekly, or monthly view and set a start and end time for your calendar day.

1. In the **Default View** field, choose to display your calendar in a daily, weekly, or monthly format.

   You can always change the view by clicking Day, Week or Month in the calendar.
2. In the Daily section, in the **Start Time** field, select the time your calendar day begins.

3. In the **End Time** field, select the time your calendar day ends.

   These can be the start and end of the work day.
4. In the **Time Increments** field, select how you want to display time on your calendar's daily view.
5. Under Calendar Sharing, check the **Public Calendar** box if you want to share your public calendar with iCal-compatible devices and applications.

   Checking this box generates a URL that you can use to view all public events on your NetSuite calendar.
6. Check the **Private Calendar** box if you want to share all of your calendar events (including private events and those shown as busy) with iCal-compatible devices and applications.

   Checking this box generates a URL that you can use to view all private and public events on your NetSuite calendar.

   > **Note:** These options only let you view calendar events in an iCal application. You can't update or edit NetSuite events from other devices. This works on iOS devices with version 7.1.0 or later. For more information, see Sharing Your Calendar with iCal-Compatible Devices and Applications.

Now you can start using your calendar. When you or others go to your calendar, your calendar appears as you set it on the Preferences subtab.

Additional setup preferences are available for each calendar portlet. For details, see the help topic Calendar Portlets.

Sharing Your Calendar with iCal-Compatible Devices and Applications

You can share your NetSuite calendar with devices and applications that support the iCal format, such as iPhones, Android devices, and Microsoft Outlook. This lets you or others view (but not edit) your current NetSuite calendar from outside NetSuite and doesn't require login credentials.

First you must set up your calendar for sharing. This creates URLs that you can use to share your calendar.

To set up your NetSuite calendar for sharing:

1. In your NetSuite account, go to Activities > Setup > Calendar Preference.
2. Click the **Preferences** subtab.
3. Under Calendar Sharing, check the **Public Calendar** box if you want to share the events on your calendar that are public.
4. Check the **Private Calendar** box if you want to share all of your calendar events.
5. Click **Save**.

When you check these boxes, NetSuite generates URLs that you can give to anyone you want to share your calendars with. You can reset these URLs anytime. After resetting the URLs, you must communicate the new URLs to those you'd like to share your calendar with.

As with any Internet calendar, reminder settings on events aren't supported for Google Calendar and Outlook, but they're supported on iOS devices (using iOS version 7.1.0 or later).

For information about how to make your calendar events public or private by default, see Setting Calendar Preferences.

See the following sections:

- Android Devices and Google Calendar
- Microsoft Outlook
- Mac OSX Devices

Android Devices and Google Calendar

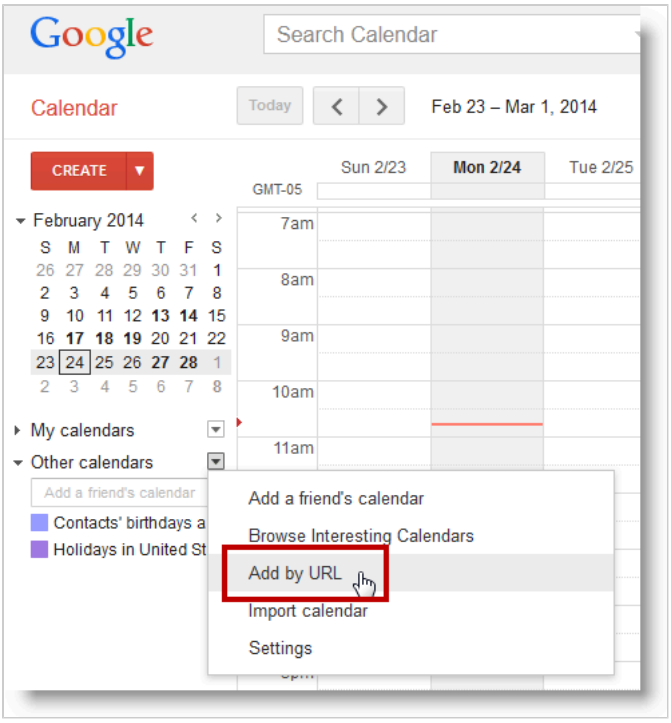
To view your NetSuite calendar on an Android device, you can either use the NetSuite for Android app or share it with your Google calendar. For more information about the NetSuite for Android app, see the help topic NetSuite for Mobile Overview.

Note: Google Calendar refreshes events from Internet calendars about every 24 hours. If you want to update your calendar more frequently, you can use other Internet calendar applications.

Important: The Google Calendar Android app lets you view only subscribed calendars. To add a calendar, you must use the browser version of Google Calendar.

To view your calendar on an Android device:

1. In a browser, open your Google Calendar.
2. Open the options next to Other calendars, and click **Add by URL**.



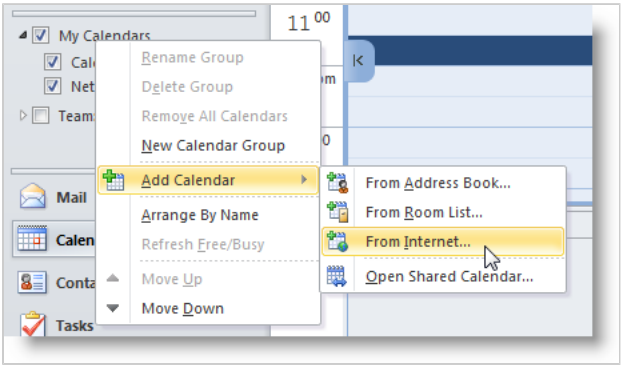
3. Copy the URL that was generated on the Calendar Preferences page in NetSuite and paste it into the URL of calendar field. For detailed information about setting up your NetSuite calendar for sharing, see Sharing Your Calendar with iCal-Compatible Devices and Applications.
4. Click **Add Calendar**.

Microsoft Outlook

To view NetSuite events in Microsoft Outlook, you can add it as an Internet calendar.

To add an internet calendar to Outlook:

1. Open your calendar in Outlook.
2. Right-click **My Calendars**.
3. Select Add Calendar > From Internet.



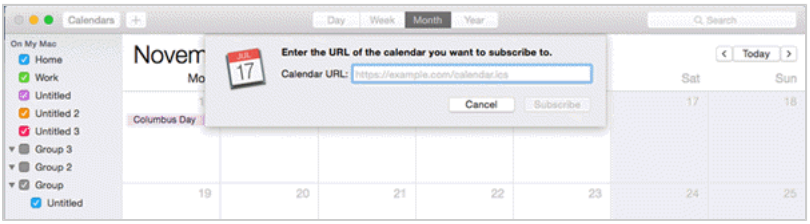
4. Copy the URL that was generated on the Calendar Preferences page in NetSuite and paste it. For detailed information about setting up your NetSuite calendar for sharing, see Sharing Your Calendar with iCal-Compatible Devices and Applications.
5. Click **OK**.

Mac OSX Devices

In some cases you might want to view your events using the Calendar application instead of logging into NetSuite. To do this, you need to subscribe to the NetSuite calendar.

To view your NetSuite calendar on a Mac

1. In Calendar, choose File > New Calendar Subscription.



2. Enter the NetSuite calendar URL from the Calendar Preferences page and then click **Subscribe**.
3. Enter a name for the calendar in the **Name** field and choose a color from the adjacent pop-up menu.
4. If you have an iCloud account, choose whether you want the calendar on that account.

> **Note:** To view a subscription calendar in Calendar on your Mac and on devices with iOS 5 or later without resubscribing to it, choose your iCloud account.

5. To get the calendar's event attachments or alerts, clear the appropriate Remove boxes.
6. To update your copy of the calendar when changes to it are published, choose the update frequency from the **Auto-refresh** pop-up menu.
7. Click **OK**.

To make changes to the calendar, click the name of the calendar, and then choose Edit > Get Info.

iOS Devices

To view your NetSuite calendar on an iOS device, you can use the native NetSuite for iPhone app, or you can add it as a subscribed calendar. For more information about NetSuite for iPhone, see the help topic NetSuite for Mobile Overview.

Note: This is supported on iOS devices with iOS 7.1.0 or later.

To view your NetSuite calendar on an iOS device:

1. Go to Settings > Calendar.
2. Tap Accounts, then **Add Account**.
3. Tap **Other**.
4. Tap **Add Subscribed Calendar**.
5. Copy the URL that was generated on the Calendar Preferences page in NetSuite and paste it into the Server field.
6. Tap **Next**.

   Important: Don't enter your NetSuite user name and password — you don't need them to view your NetSuite calendar on your iOS device.

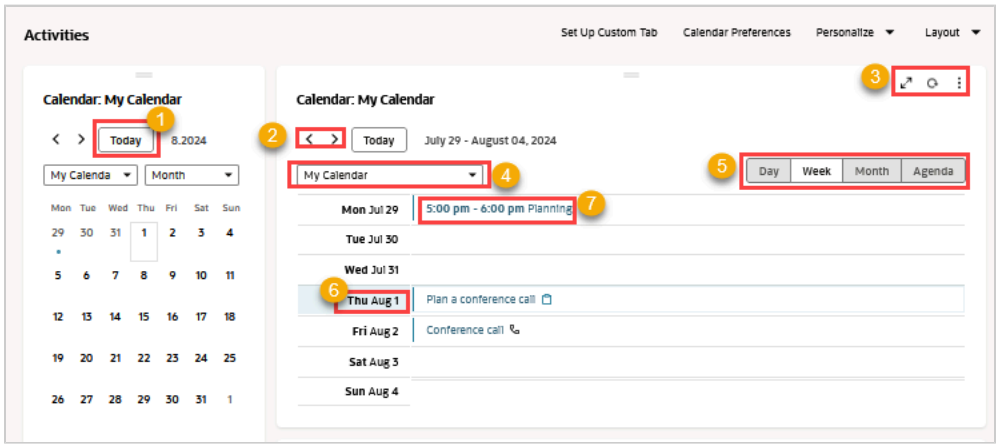
7. Tap **Save**.

Navigating Your Calendar

By default, your Activities page shows a monthly calendar on the left and a list of calendar events in the center. You can view your calendar by day, week, or month.

To see your calendars, click the Activities tab.

For more information, see Setting Calendar Preferences.



The screenshot above shows actions you can complete with the calendar. Both calendars are calendar portlets, but one is set to monthly view in the narrow dashboard column, and the other is a daily view in the wide column. The numbered options below match the numbers in the screenshot above:

1	Click **Today** to highlight today's date. The same button in daily view in the wide column displays all events scheduled for today.
2	Click the arrows at the top of a calendar to view the next or previous increment of the view. The arrows in the narrow calendar move through the months. In the wide calendar the arrows move through the days.
3	Click **Print** in the portlet menu to print the events listed in the center of the page. Click the icon to refresh the contents of the calendar.
4	Select a calendar from the dropdown list. You can see only calendars and calendar entries that have been shared with you or made public.
5	Click **Daily**, **Weekly**, or **Monthly** to change the calendar view. In the narrow calendar, these options are included in a dropdown list instead of buttons.
6	In daily view, click a time to open a popup and create a new Event, Call, or Task. When you click a day in weekly view, the calendar changes to daily so that you can create a new entry. In monthly view, when you click a day, the behavior depends on whether the calendar is narrow or wide. In narrow calendars, the view changes to daily. In wide calendars, the Create New popup opens.
7	Click an event to view the event's record in a wide calendar. In the narrow monthly calendar, click a date to view events for that day. Hover over a date to see the events in a popup without changing the calendar view.

Calendar Colors

Colors show the status of your events.

- Solid green means you've accepted an event.
- Thin diagonal green lines mean you've tentatively accepted an event.
- Gray means you haven't responded to the event yet.
- White shows a calendar entry that isn't an event.

If you decline an event or it's canceled, it won't show on your calendar.

Displaying Your Calendar

You can display the Calendar portlet on your NetSuite Home page.

To show the Calendar portlet on the Home page:

1. Go to Home > Dashboard.
2. Click the **Personalize** link in the upper right of the page. The Personalize Dashboard palette opens at the top of the page.
3. In the Standard Content panel, click **Calendar** to add the portlet.
4. Click **Set Up** in the portlet menu to set your preferences.

Synchronizing Your Calendar

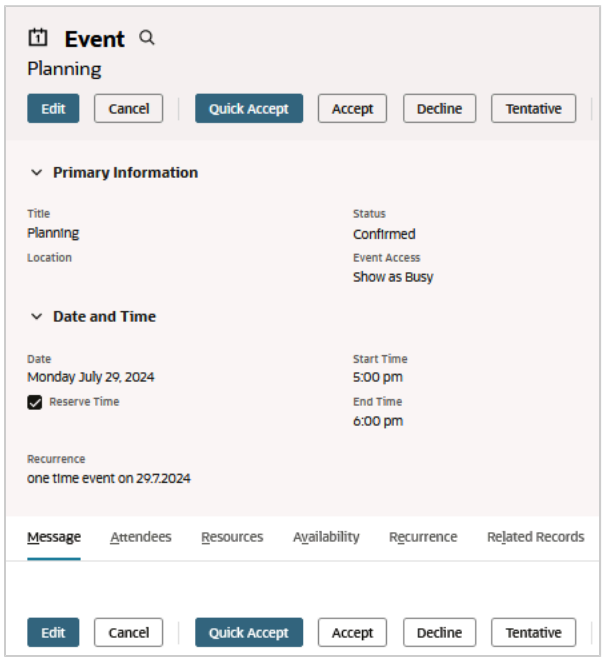
With synchronization, you can quickly import and update your contacts, calendar events, tasks, and phone calls between NetSuite, Microsoft Outlook, and the Microsoft Outlook Exchange Server.

NetSuite for Outlook lets you sync contact, event, task, and phone call records one-way or both ways between NetSuite and Outlook. You can also save Outlook messages to NetSuite records. You can download the client from NetSuite and run it as an Outlook Add-In.

For information about using NetSuite for Outlook for synchronizations, see the help topic NetSuite for Outlook.

Working with Events

In NetSuite, you use event records to reserve time on your calendar for appointments and meetings. When you create an event, you're the owner. If you're invited to an event and you accept, you're an attendee. You can click on an event displayed on your calendar to see more information about it, such as the location and a list of the people invited.



Read the topics below to learn more about working with events:

- Scheduling Events describes how to create new event records and how to use the Scheduler portlet to schedule events.
- Sending Event Invitations describes how to send an email invitation with details about the event, including the date, time, and location.
- Setting Up Recurring Events describes how to create a record for an event that occurs on a regular basis, such as a weekly or monthly meeting.
- Using Resource Records on Events describes how to use event records to reserve certain resources, such as a conference room or a speaker phone.
- Tracking Time for Events describes how to keep track of time spent on events for purposes of reporting and billing. Note that you can only track time on events if you use the Tracking Time for CRM feature.
- Responding to Event Invitations describes how to accept, decline, or mark an event invitation as tentative.

- Setting Up Event Reminders describes the different types of event reminders and how to set them up when you edit an event record or respond to an event invitation by email.
- Canceling or Deleting Events describes the difference between canceling and deleting events, as well as how to cancel one-time and recurring events.
- Searching Event Records describes how to set filters and find events that aren't listed on your Events page.
- Sharing Your Calendar with iCal-Compatible Devices and Applications explains how to share your NetSuite calendar with Outlook, and iOS and Android devices.

Scheduling Events

You can schedule an event through an event record or by using the Scheduler portlet. The Scheduler is convenient when organizing an event for a group. You can click an event link on your calendar to make changes if you need to.

For more information about scheduling events, see the following:

- To understand how to enter information about an event record, read Creating a New Event Record.
- To learn how to invite a group of people to an event, read Using the Event Scheduler Portlet.
- To find out about keyboard shortcuts, managing conflicting events, and marking events as private, see Event Scheduling Notes.
- To add a resource to an event, read Using Resource Records on Events.
- To learn how to cancel an event, or how to remove it from your calendar, read Canceling or Deleting Events.

Creating a New Event Record

Use an event record to send an email invitation, attach a document for discussion, and to reserve a resource such as a conference room.

When you create an event, you're the owner and automatically designated as the organizer. Only you can create events on your calendar. The event's organizer, owner, or any role who has edit- or full-level permissions to events on your calendar can make changes to the event records including assigning or changing organizers.

> **Note:** Administrators can view, edit, or delete any task, event or call, even if it's not assigned to them and regardless of the event's access settings.

To create a new event record:

1. Go to Activities > Scheduling > Events > New.
2. Under Primary Information:
    1. You can select a Custom Form (optional).
    2. In the **Title** field, enter the subject or title for this event.
    3. Fill in the **Location** field, and select the date of this event.
    4. Select whether the status of the event is **Confirmed, Tentative** or **Canceled**.
    5. In the **Event Access** field, select how you want this event to appear on your calendar.
        - **Public** – Everyone with access to the calendar can see this event and its details.

- **Private** – This event appears only to you and to invitees with access to the calendar. For more information, see Event Scheduling Notes.
- **Show as Busy** – This event appears as a busy time slot to everyone with access to the calendar. No other information about this event is shown.

6. In the **Organizer** field, select the person who's organizing this event. The event organizer is automatically set as an accepted attendee for this event.

   If you change the organizer, the new organizer isn't automatically added to the attendee list.

3. Under Date and Time:
   1. Select a date for the event.
   2. Check the **All Day** box, if the event lasts all day.

      When you check this box, the start and end times fill in automatically based on your calendar preferences.

      > **Note:** If you need to create an event that spans multiple days, create an all day event for the first day, and on the Recurrence subtab, choose Daily and set the last day of the event in the End By field.

   3. Check the **Reserve Time** box if you want to reserve time on your calendar for this event.

      Events that don't reserve time appear first on your calendar for that day—for example, birthdays or anniversaries.
   4. Select the start and end times for this event. If the selected time slot conflicts with any existing events, you'll get a popup warning.
   5. In the **Reminder Type** field select the type of reminder you want to get.
   6. In the **Reminder** field, select a time before the event when you want to be reminded. For more information, see Setting Up Event Reminders when Creating or Editing Events.
4. On the **Message** subtab, enter the message you want to show in the email invitation that's sent to attendees and is shown on the event record.

   Optionally, you can get writing help for the **Message** field from our generative AI service, NetSuite Text Enhance. Click the **Enhance Text** button to use the available options. For more information about using this capability, see Text Enhance.
5. Click the **Attendees** subtab.
6. In the **Send Invitation To** column, select a name from the list. For more information, see Sending Event Invitations.
7. In the **Attendance** column choose whether this attendee is required or optional.
8. Click **Add**.
9. Repeat these steps for each attendee.
10. On the **Resources** subtab, you can reserve the necessary resources for this event such as a conference room or presentation materials. For more information, see Reserving Resources for Events.

    You can see the availability of the people and materials you've selected on the **Attendees** or **Resources** subtabs on the **Availability** subtab.

    Click the arrows next to the date to view the availability on other days. The time window shown on this subtab is the same as the Daily start and end times set in your calendar preferences.
11. Click the **Recurrence** subtab if the event is part of a series of events. For more information, see Setting Up Recurring Events.
12. When you've finished entering all of the information for this event, click **Save**.

The following are optional settings on the event record:

- On the **Related Records** subtab:
  - Select a company if this event is related to a customer, vendor, partner, or other name. The event record is attached to the entity record.
  - The **Contact** field lists the contacts for the entity you've selected. Select the contact with whom this event is associated, if any.
  - If this event pertains to a support case, select the case number in the Support Case field. The event record is attached to the case record.
  - If this event is related to a transaction, select the transaction number. The event is listed on the **Events** subtab of the transaction record.
- Use the **Time Tracking** subtab, if you use the Time Tracking for CRM feature and want to track time for this event. For more information, see Tracking Time for Events.
- Click the **Communication** subtab to attach a file to this event. For more information about how to attach files, see Attaching Files to Records.

Using the Event Scheduler Portlet

The Scheduler portlet is a quick way to enter event records. The Scheduler lets you select people to invite, and see their availability directly on the Activities tab in NetSuite. It's useful for creating a group event. When you select the group in the View Group list, you'll see the list of group members in the Scheduler. After you set the date and time, click Create New Event to create the event record.

To schedule an event by using the Event Scheduler portlet:

1. Click **Activities Overview** on the **Activities** tab.

   By default, the Scheduler portlet is located at the bottom of the Activities page.
2. From the **View Group** list, select the group for which you want to schedule an event.
3. Select the date of the event.

   The earliest available time slot for everyone in the group is highlighted.
4. Click on a time slot for the event.
5. Drag the slider bars under the time to set the duration of the event.
6. Clear the boxes next to the group members you don't want to invite to the event.

   The organizer isn't invited by default.
7. Click **Add Invitees** or **Add Resources** to include people or resources who aren't part of the group you selected.

   After you save the event, the event displays on the invitees' personal calendars.

8. Click **Create New Event.**
9. Enter the title and other information about the event.
10. Click **Save**.

Event Scheduling Notes

As you're scheduling events, be aware of the following:

- Scheduling Events
- Calendar Hot Keys for Events
- Using the Event Scheduler Portlet
- Warning for Conflicting Events
- Marking Events as Private

Calendar Hot Keys for Events

You can use keyboard shortcuts to quickly set dates on events and transactions. In NetSuite date fields, use the following keyboard shortcuts to quickly change dates:

- Press Shift + t to enter tomorrow's date.
- Press t to enter today's date.
- Press y to enter yesterday's date.
- Press m to enter the end of the month.
- Press the Plus key (+) to move forward one day.
- Press the Minus key (-) to move back one day.

Warning for Conflicting Events

On an event record, when you select start and end times that conflict with an existing event, NetSuite displays a warning that clearly indicates the name and time of the conflicting event.

Marking Events as Private

Only the owner of the event and the attendees can view an event marked as private. Private events don't show on the calendar, and they appear as Busy when checking availability on event records. If you've checked the Can Access Private Events box for one or more users, these users can see private events. Only attendees can track time against a private event.

> **Note:** Only the owner of a private event can delete it. Even users with the Administrator role can't delete private events from another user's calendar. These events must be deleted using the Delete Events mass update. See the help topic Mass Deleting an Employee's Events.

Sending Event Invitations

Use the Attendees subtab on the Event record to select attendees for an event and to send email invitations.

After you save an event record, it appears on the NetSuite calendar for each person invited.

To create and send event invitations:

1. On the event record, click the **Attendees** subtab.
2. In the **Send Invitation to** column, select the name of the person or group you're inviting to this event.

   The **Availability** field is automatically filled by NetSuite. When those invited aren't in your company, this field always says Available.

   If the person or group is in your company, their availability depends on whether they have conflicting events in their NetSuite calendars. You can view availability on the Availability subtab.

   The **Response** column defaults to the status **No Response** when you add an invitee.

   When those invited get the invitation to the event, they can accept, decline, or tentatively accept the invitation. Their status displays here, on the event record. For more information, see Responding to Event Invitations.
3. In the **Email** column, check the box next to each person to whom you want to send an email invitation.

   Check the **Notify Attendees by Email** box to send email to attendees in the list based on your preference for sending invitation email. For more information, see Personal Preferences for Activities.
4. In the **Attendance** column, select whether each person's attendance is optional or required.
5. Click **Add**.
6. Repeat these steps for each person or group you want to invite.
7. When you've added everyone you want to invite, click the **Availability** subtab to see if they're all available at the selected time, or click **Save** if you're finished with this event.

You can restrict the contacts that appear in the **Send Invitation To** column by setting the Restrict Invitees to Employees preference on the Activities subtab at Home > Set Preferences. If you check this box, only employees appear in the **Send Invitation To** column.

Setting Up Recurring Events

If an event occurs on a regular basis, such as weekly, monthly, or on a specific day of the month, you can set a recurrence pattern for the event. The event appears on the calendar on the dates when it occurs.

To make an event occur more than one time:

1. On the event record, click the **Recurrence** subtab.
2. Select how often this event should occur:
   - **Daily** – Enter the interval between days if this event is every day or every few days, or select every weekday if this event is every day except Saturdays and Sundays.

     Enter 1 as the interval if this event is every day, for example, or enter 2 if the event repeats every other day.
   - **Weekly** – Enter the number of weeks between events, and pick the day of the week the event repeats.
   - **Monthly** – If the event falls on the same date every month or every few months, enter the date it repeats and the number of months between events.

- **Yearly** – If this event takes place one time a year, select the month and day of the event, or select the week, day and month.

3. In the **End By** field, set the date when this event stops recurring.
4. If the event continues indefinitely, check the **No End Date** box.
5. If you need resource materials for this event, click the **Resources** subtab. For more information, see Using Resource Records on Events.
6. Click **Save** to save the event.

To edit a recurring event, go to the calendar in NetSuite and click the event link. Select the occurrence or series.

Invitees can decline either the entire series of events or specific dates in the series.

> **Note:** If you change your time zone preference at Home > Set Preferences > Activities and then edit an event created in your original time zone, you may need to review the recurrence settings for that event to ensure they're set properly before saving your changes.

Using Resource Records on Events

Resources can be anything from conference rooms to speaker phones that you use within your company for meetings, and conferences. In NetSuite, you create resource records to reserve these items.

You must use the Resources subtab on the event record to reserve a resource for an event. If someone else creates an event for the same time, and tries to reserve the same resource, the resource shows as busy.

For information about using resource records, see the following:

- Creating a Resource
- Reserving Resources for Events

Creating a Resource

When you create a resource record, you're also creating a calendar associated with the resource. If the resource is public, then any NetSuite user in your account can select the resource on the calendar page and see when the resource is booked for a certain day, week, or month.

To create a resource record:

1. Go to Activities > Setup > Resources and click New.
2. In the **Name** field, enter a name for this resource. This name appears in the list on the Resources subtab of event records.
3. The **Owner** field displays your name by default as the creator of this resource record. You can select another user to be responsible for this resource record.
4. Enter a brief description of this resource in the Description field.
5. Check the **Private** box if you only want the owner to be able to view the resource calendar.
6. The **Title** field displays the name of the resource. You can edit this field if you want to rename the resource.

7. In the **Daily Start Time** and **Daily End Time** fields, select the time this calendar day begins and ends.

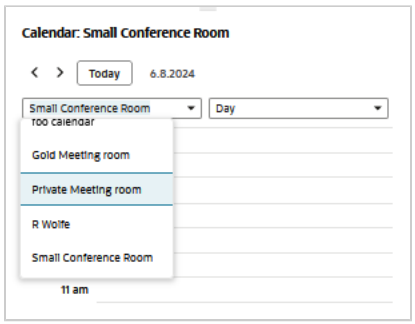
   This can be the start and end of the work day, or any time you want to see events on this resource calendar.

8. Click **Save**.

Now you can set calendar preferences for this resource and reserve this resource when you schedule events. For more information, see Setting Calendar Preferences for a Resource and Reserving Resources for Events.

Setting Calendar Preferences for a Resource

After you've created a resource record, you can select the resource in the My Calendar list on the calendar to check for availability.



Make changes to the resource record and its calendar preferences by going to Activities > Setup > Resources, and clicking Edit next to a resource.

The following fields display on the Calendar Preferences subtab of the Resource record:

- **Title** – The resource name entered in the Name field appears here as the name of the calendar.
- **Daily Start Time** and **Daily End Time** – Select the time that this calendar should begin showing events, and the time when this calendar should stop showing events.
- **Default View** – Choose to display this calendar in a daily, weekly or monthly format.
- **Daily Time Increments** – Select the increments of time for this calendar's daily view.
- **Sharing** – Choose a level of access for this calendar. Note that you can still specify on event records how you want events to appear on this calendar.
  - **Public** – This gives everyone in your company access to this calendar.
  - **Defined Below** – This restricts everyone in your company from seeing this calendar except the people you select in the section below.

    Give certain people access to this calendar by selecting a name in the **User column**. Only NetSuite users with login access appear in this list.

    In the **Access Level column**, choose the level of access for each person who is allowed to see this calendar:
    - **None** – This person can't access this calendar.
    - **View** – This person can see events marked public and busy times for events marked busy.
    - **Edit** – This person can see, change and remove events marked public and see busy times for events marked busy.
    - **Full** – This person has complete access for viewing and editing this calendar.

Note: Private events aren't shown even to people with access to this resource calendar. To grant access to private events, check the **Can Access Private** Events box for the selected user.

Reserving Resources for Events

Reserving resources is similar to inviting attendees. You must create resource records at Activities > Setup > Resources > New > New before you can reserve them for events.

To reserve a resource for an event:

1. On the event record, click the **Resources** subtab.
2. In the **Resource** column, select the resource you need to reserve. The resource availability for the time of this event shows in the **Availability** column.
3. Click **Add**.

   You can view the availability of the resource for other times on the **Availability** subtab after you've added the resource.

If you've not provided a location for your event, NetSuite uses the location associated with the resource you're planning to use as the suggested location for the event. For example if you add “Conference Room A, San Mateo” to an event with a blank Location field, the location will be updated to San Mateo. This only happens when you add a resource for the first time. If you later change an event resource, the main event Location field stays the same, assuming you want to use a resource from another location, but not change the physical event location.

Tracking Time for Events

Time Tracking for CRM lets you track time spent on events and bill that time to customers, if needed. Before you can use this feature, an administrator must enable the Time Tracking for CRM feature. See the help topic Enabling Time Tracking for CRM.

To track time on event records:

1. Go to Activities > Scheduling > Events.
2. On the **Events** list, click the event for which you want to track time.
3. On the Event record, click the **Time Tracking** subtab.

   Note: If any case, task, or event record has more than 9500 time entries to display on the Time Tracking subtab, all events display a static list of time entries. You can't edit entries directly from the list.
4. Click **New Time**.

   A new time transaction window opens.
5. Your name is selected in the **Employee** field by default. You can select other employees or vendors here.

   Note: For private events, only employees and vendors listed as attendees on the event record can track time for the event.
6. Enter information for this time transaction.

For more information about entering time for Time Tracking, see the help topic Entering a Time Transaction.

For more information about entering time for Timesheets, see the help topic Timesheets.

7. When you've finished, click **Save**.

If the **Billable** box is checked, you can bill the customer for this time on the **Billable Time** subtab when you create an invoice. You can view reports for time spent on cases, tasks and events on the Reports tab, under the Project/Time Tracking heading.

All employee names display on the **Time** subtab by default.

Responding to Event Invitations

When you're invited to an event, you can choose to accept or decline the invitation or mark it as tentative. Unless the event organizer selects a response for you on the event record, your status is "No Response" until you respond.

To respond to an event invitation choose one of the methods listed below:

- **Email**

  Click the Accept, Tentative or Decline link displayed in the email invitation.

  You don't need to log in to NetSuite to respond to the event with this method.

  Note that you don't have the option to set up an event reminder with this method.

- **Events List**

  Go to Activities > Scheduling > Events. This is useful when you have several events to respond to.

  To accept all events at one time, click **Accept All** on the event list.

  To respond to individual events, click **Edit** next to the event, and then click the appropriate button on the event record.

- **Calendar**

  Go to the Activities tab to see your calendar, or go to Activities > Scheduling > Calendar.

  Click the event in the calendar to open the event record, and then click the appropriate button to respond.

- **Calendar Portlet**

  Go to a Calendar portlet on your Home or Activities tab.

  Hover over the event in the portlet to display the event popup.

  Click the appropriate button on the event popup.

> **Note:** To display the Calendar or Reminders portlet on your home page, click the **Personalize** link at the top of the Home page, and then select **Calendar** or **Reminders** from the Standard Content panel.

Listed below are the available responses for an event invitation:

- **Quick Accept** — Accept the event without responding to the event organizer or setting a reminder. For more information, see Quickly Accepting Event Invitations.

- **Accept** — Agree to go to the event. With this option you can send an email response to the event organizer.
- **Tentative** — Wait to respond to this event.
- **Decline** — Defer from going to this event. With this option you also can send an email response to the event organizer.

  If you decline the event, the event is removed from your calendar.
- **Decline This Date** — Decline only this occurrence of a recurring event.

Unless you click Quick Accept in NetSuite, when you respond to the event, a popup window opens. Here, you can email your response to the event organizer, and set your personal reminder for this event. For more information, see Setting Up Event Reminders.

If you choose not to send an email when you respond to the event invitation, the event organizer can still see the status for each invitee on the event record. People with permission to see the event's record can also see everyone's response status.

To set default preferences for events, see Personal Preferences for Activities.

Quickly Accepting Event Invitations

If you get several event invitations every day, you can quickly accept them by clicking the Quick Accept button on event records.

Using the Quick Accept button:

- Accepts the event without asking you to set a reminder or respond to the event organizer.
- Marks the event as accepted.
- Adds the event to your calendar.

To quickly accept an event, open the event record, and click Quick Accept.

If you accept events from the email invitation, you can click the Accept the event link on the email message to quickly accept the event.

Accepting Event Invitations on Behalf of Others

If you have Full or Edit access level to your colleague's calendar, you may accept event invitations on their behalf. To give a colleague access to your calendar see Calendar Access

Setting Up Event Reminders

Event reminders are sent either as email messages, or as popup messages in NetSuite. Reminders show the day, date, time, title and location of the upcoming event.

Event reminders are helpful when an event is scheduled far in advance.

When you get a popup reminder, you can do the following:

- Click **Dismiss** to close the window
- Click **Go to Event** to open the event record in a new window.
- Click **Snooze** to select the amount of time before you want to be reminded again.

By default, reminders have audio. You can change this preference, and set other preferences for event reminders on the Activities subtab at Home > Set Preferences.

When you're logged in to NetSuite with your default role, the preference you set for Default Reminder Type determines the type of reminder you get for events. If you're not logged in with your default role, then the type of reminder you get is set by a company-wide preference your account administrator chooses. For more information, see Personal Preferences for Activities.

You set event reminders when you create or edit an event, or when you accept or tentatively accept an event invitation. For instructions, see the following help topics:

- Setting Up Event Reminders when Creating or Editing Events
- Setting Up Event Reminders when Responding to Event Invitations

Setting Up Event Reminders when Creating or Editing Events

NetSuite offers different options for event reminders. You can get your reminders by email or in a popup window when you're logged in to NetSuite. Note that others invited to the event can set their own reminders when they accept or tentatively accept the event invitation.

To ensure that you get your reminder at the correct time, make sure the clock on your computer is set to your time zone, and then go to Home > Set Preferences to set the same time zone in NetSuite.

To set up event reminders when creating or editing an event:

1. Go to Activities > Scheduling > Events.
2. Click **Edit** next to an event in the list.
3. In the **Reminder** field, select the amount of time in advance of the event that you would like to be reminded.
4. In the **Reminder Type** field, select how you want to be reminded.

   Popup reminders pop up in a window at the set time if you're logged into your NetSuite account.

   Email reminders go to the email address you use to log in to NetSuite.
5. Click **Save**.

Note: If you select **None** in either the **Reminder** field or the **Reminder Type** field, you won't get a reminder.

Setting Up Event Reminders when Responding to Event Invitations

To set a reminder when you respond to an event invitation, you must log in and accept the invitation in your account. You can't set reminders when using the links included in the email invitation.

To set up event reminders when responding to an event invitation:

1. Log in to your NetSuite account.
2. On the Home page, click the link in the Calendar portlet to respond to the event invitation.

   The event record appears in view mode with buttons to respond to the invitation.

   For a complete list of ways in which to respond to an event invitation, see Responding to Event Invitations.
3. Click **Accept** to accept the invitation, or click **Tentative** to tentatively accept the invitation.

A window pops up where you can choose to email the event organizer and set your reminder for the event.

4. Choose whether to send the event organizer an email including your response. If you decide to email the organizer, you can add your own message to the email.
5. In the **Reminder** field, select the amount of time before the event's start time that you want to get a popup or email reminder.
6. In the **Reminder Type** field, select which kind of reminder you want to get: popup, email or none.

   Note: If you select **None** in either the Reminder field or the Reminder Type field, you won't get a reminder.

7. Click **OK**.

Your event now appears on your calendar with a reminder icon. Note that if you decline an event invitation, you can't set a reminder and the event doesn't show on your calendar.

Canceling or Deleting Events

Only an event's organizer can cancel or delete an event.

When canceling an event, you can use the event record to alert attendees and to update the event's status. If your event is recurring, you can choose to cancel one instance or cancel the entire series of events.

Canceled and deleted events are removed from the calendar unless you enable the Show Canceled Events option in your portlet setup. For more information, see the help topic Calendar Portlets.

Note: To edit events from the calendar, make sure you've checked the Edit Activities from Calendar box on the Activities subtab at Home > Set Preferences.

For more information, see the following:

- Canceling Events
- Deleting an Event

Note: Administrators can delete events in bulk for employees who are no longer with your company. See the help topic Mass Deleting an Employee's Events

Canceling Events

You can cancel an event from the Events list or from your calendar. Only an event's organizer can cancel or delete an event.

Note: If you use NetSuite for iPhone, canceled events aren't included in the iCalendar export.

To cancel an event:

1. Go to your calendar in NetSuite, and click the name of the event.
2. If the event is recurring, select **Open this occurrence** or **Open the series** in the popup.
3. In the event record, click **Edit**.

4. In the **Status** dropdown list, select **Canceled**.
5. On the **Attendees** subtab, check the **Notify Attendees by Email** box to update everyone invited about the status of the event.
6. Click **Save**.

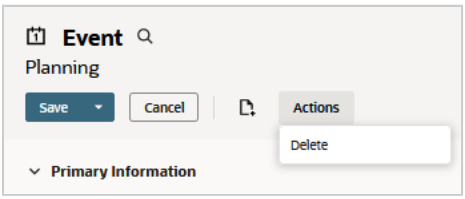
If you don't need to notify invitees and want to remove the event from your Events list, you can delete the event. For more information, see Deleting an Event.

Deleting an Event

You must be the organizer to delete an event. Note that when you delete an event, attendees aren't notified, and the event is removed from the calendar.

To delete an event:

1. Go to your calendar in NetSuite, and click the name of the event.
2. If the event is recurring, select **Open this occurrence** or **Open the series** in the popup.
3. On the event record, click **Edit** or **Edit This Date** for a single instance of a recurring event.
4. In the **Actions** dropdown list, click **Delete**.



Note: Administrators can delete events in bulk for employees who are no longer with your company. See the help topic Mass Deleting an Employee's Events

Searching Event Records

You can find a list of public and private events on the Events page at Activities > Scheduling > Events. Note that the list only displays events where you're listed as an attendee, no matter who owns the event and regardless of the event's access settings. If you want to see a list that includes events where you're not an attendee, you can run a defined search.

To search event records:

1. Go to Activities > Scheduling > Events > Search.
2. Define at least two search filters. You can choose more than one option from each filter. To choose multiple options, click the names while holding the Ctrl key.

   Important: If you only set the Date filter, you'll see only the events which you're invited to. Add more filters to expand the search.

3. Click Submit.

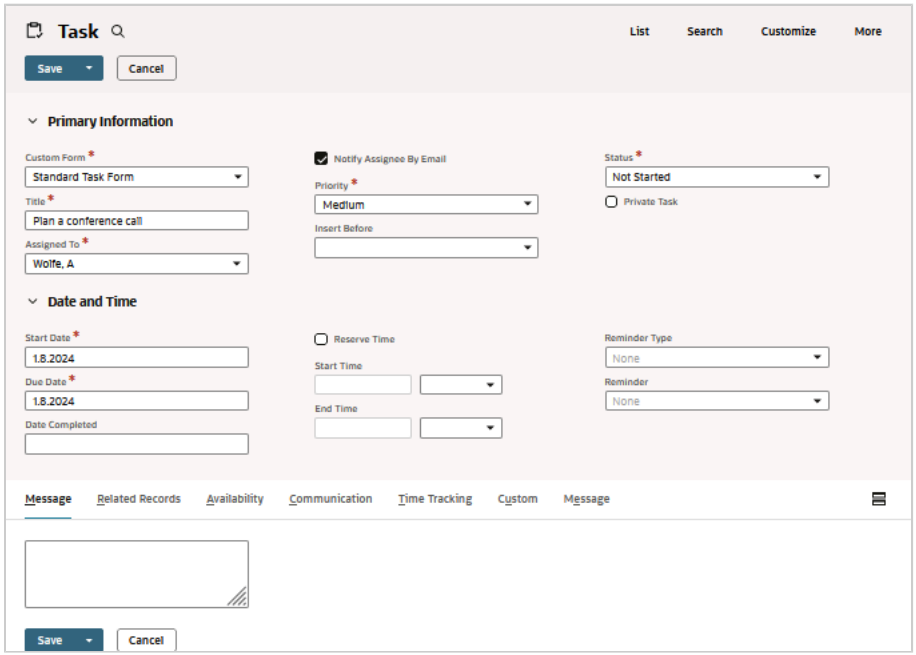
For more information about running simple searches in NetSuite, see the help topic Defining a Simple Search.

Working with CRM Tasks

In NetSuite, tasks help you track work items that need to be completed within a certain time. Tasks can be assigned to you or to another person in your organization. NetSuite lets you create two different types of tasks: CRM Tasks and Project Tasks.

CRM Tasks

You can create a task and assign it to an employee for completion, or assign it to yourself as a reminder.



You can also assign tasks to partners. Go to Lists > Partners, click the partner record you want to work with, and then check the Assign Tasks box on the partner's record. The Assign Tasks box appears only if your administrator has enabled the company general preference Assign Tasks to Partners.

Each record contains details about the work that needs to be completed. If you're assigned a task, you can change or update information by clicking Edit next to a task from the tasks list. You can also update the status of your tasks as you make progress or complete them. A task shows on your list of tasks until you mark it Completed or you delete it. For more information, see Creating CRM Task Records.

If your administrator has enabled the Time Tracking for CRM feature, you can track time of tasks records to help you manage your time. For more information, see Tracking Time on CRM Tasks.

CRM tasks may be associated with a project but aren't considered part of the project's schedule unless you check the Include CRM Tasks in Project Totals box. For more information, see the help topic Including CRM Tasks in Project Totals.

You can view tasks associated with a customer record in the Tasks portlet of the customer dashboard. For information about displaying CRM Tasks and Project Tasks on your dashboard, see Tasks and Project Tasks Portlets on Your Dashboard. Tasks that are related to one or more customers are displayed in each dashboard's Activities portlet. If you want to see the list of companies that are related to a task record, go to the Task page through the Task portlet or through Activities > Scheduling > Tasks. Then, go to the **Related Records** subtab and see the list under **Companies and Contacts**.

Project Tasks

Use project task records instead of CRM task records to track information for projects. For more information, see the help topic Setting Up Project Management.

You can create a project task record **only** if you use the Project Management feature. Each project task represents an individual work item that must be completed to finish a project, and can only be created on a project record. Project tasks help with project planning. On project records, the Financial subtab shows the Project Revenue Recognition Summary information, which is visible when the Project Revenue Recognition feature is enabled. The summary information shows total revenue, recognized revenue, planned revenue, and a link to Revenue Arrangement. This improvement helps you find the respective revenue arrangement for the project and it provides more transparency.

Creating CRM Task Records

Create a new CRM task record to track work items that need to be completed. Administrators can use the Import Assistant to import CRM tasks from another system into NetSuite. For more information, see the help topic Tasks Import.

To track tasks associated with projects, use Project Task records. For more information, see the help topic Project Task Records.

To set a preference for CRM Tasks to display on your calendar, go to Activities > Setup > Calendar Preference > Preferences subtab. Check the Display Non-blocking Tasks in Calendar box.

To create a CRM task:

1. Open a new task record by doing one of the following:
   - Go to Activities > Scheduling > Tasks and click **New**.
   - Click **Task** in the Create New menu.
2. In the Primary Information field group:
   - Select the form you want to use in the **Custom Form** field. This field appears only if multiple task forms are available.
   - Enter a **Title** for the task. The title should describe the task.
   - In the **Assigned To** field, select the employee who is assigned to the task.

     Your name appears in this field by default.

     > **Note:** In NetSuite OneWorld accounts, employees from all subsidiaries show in this field.
   - Check the **Notify Assignee by Email** box to send an email notification to the assigned person. This email informs the person that a task has been created or edited and assigned to them. If this person's record doesn't have an email address, no message is sent.
   - Select the appropriate level of priority for this task.
   - Use the **Insert Before** field to change the order of tasks. Select a task from the list that the new task should be placed above.
   - Select a **Status** for this task. Only someone with permission to edit the task record can change the status.
   - (Optional) Check the **Private Task** box if you want only you or the person in the **Assigned To** field to see this task. If you also use Time Tracking for CRM, only the person assigned to a private task can track time against the task.

3. In the Date and Time field group:
   - Set the **Start Date** for this task.
   - In the **Due Date** field, enter the date when this task should be completed.
   - After the task is finished, fill in the **Date Completed** field.

     Note: You can edit the value in the Date Completed field even after you set the Status to Completed.
   - (Optional) Check the **Reserve Time** box to turn the task into a scheduled task which can be displayed on the calendar. When you check this box, the **Start Time** and **End Time** fields become required fields.
     - Select the **Start Time** and **End Time**.

       Note: Use the **Availability** subtab to view when the person assigned to the task is available.
     - In the **Reminder Type** field, select a type of reminder for scheduled tasks that appear on the calendar:

       None – No reminder is triggered.

       Email – An email reminder is sent to the email address on the employee record for the person selected in the Assigned To field.

       Popup – A popup reminder opens when the person assigned to this task is logged in to NetSuite.
     - In the **Reminder** field, select a time before the task begins when you want to see the reminder.

       Note: You must select both a **Reminder Type** and a **Reminder** time to trigger the reminder. The person assigned to this task can edit the task record to change the reminder settings.
4. Review and edit other subtabs as necessary.

   Message subtab:

   In the **Message** field, enter notes or a description about this task. These comments appear in the email message sent to the person this task is assigned to.

   Optionally, you can get writing help for the field using our generative AI service, NetSuite Text Enhance. Click the Enhance Text button to use the available options. For more information about using this capability, see Text Enhance.

   Related Records subtab:
   - Select a **Company** if this task is related to a customer, vendor, partner, or other name.
   - The **Contact** field lists the contacts for the company you've selected. Select the contact associated with the task.
   - If this task is related to a support case, select the case number in the **Support Case** field.
   - If this task is related to a transaction, select the transaction number in the **Transaction** field.
   - Select and add multiple companies and contacts associated with this task.

     For example, you can add the contact who requested the task or requires reporting on this task in the **Companies and Contacts** list.

   Availability subtab – Displays the availability of the user assigned to the task.

   Communication subtab:

- Click the **Files** subtab to attach a file to this event. For more information about attaching files, see Attaching Files to Records.
- Click the **User Notes** subtab to add any notes about this event.

Time Tracking subtab:

If you've enabled either the Time Tracking for CRM or Project Management feature, you can track time for this task. For more information, see Tracking Time on CRM Tasks.

5. After you've filled in information about these subtabs, click **Save**.

You can change or update existing tasks by clicking Edit next to a task from the tasks list.

As you work on your tasks or complete them, update the status of the tasks. If the tasks aren't marked private, others can see your progress and know what you're working on. This facilitates communication between departments within your company.

Tracking Time on CRM Tasks

You can enter time transactions to track the amount of time spent on each task. To track time on tasks an administrator must enable the Time Tracking for CRM feature. See the help topic Enabling Time Tracking for CRM.

With Time Tracking for CRM, you can track time on tasks, phone calls, events, and cases. Tracking time on these activities helps you manage your company by making you aware of how much time is spent on different activities.

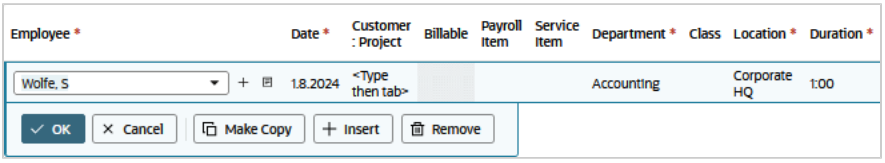
To track time on CRM tasks:

1. Click **Edit** next to an existing task record on the Tasks list at Activities > Scheduling > Tasks. For more information, see Creating CRM Task Records.
2. Click the **Time Tracking** subtab on the task record.

> **Note:** If any case, task, or event record has more than 9500 time entries on the Time Tracking subtab, all CRM tasks display a static list of time entries. You can't edit entries directly from the list.

> **Note:** If you use the Project Management feature, you can include CRM tasks in project totals. Note, however, that you must use project task records to track tasks associated with specific projects.

The fields below display on the **Time Tracking** subtab only when you use the Project Management feature.



- **Initial Time Budget** – Enter your first estimate of the time needed for this task. Later you can update your estimate in the **Current Time Budget** field. Keeping your initial time estimate in this field lets you compare it to your current estimate. If you entered a time estimate on a project task template, that amount shows in this field.

- **Current Time Budget** – If your estimate of the time changes from your original estimate, enter the new estimate in this field.
- **Actual Time** – This field shows the total amount of time entered against this task.
- **Time Remaining** – This field shows the estimated remaining amount of time for this task. Time remaining is calculated as (Initial Time Budget - Actual Time).

  If you've entered a **Current Time Budget** amount to update your initial time budget, then the time remaining for the task is calculated as (Current Time Budget - Actual Time).
- **Percent Time Complete** – This field shows the calculated total of work that has been completed to date in percent format. The percent complete is calculated as (Actual Time * 100%) / Initial Time Budget.

  If you've entered a **Current Time Budget** amount, then the percent complete is calculated as follows (Actual Time * 100%) / Current Time Budget.
- **Percent Complete** – Enter an estimate of how much of the total amount of work for this task is already completed. For example, if half the work is done, enter **50%**. The percentage you enter in this field overrides the system calculation in the **Percent Time Complete** field and is used for task calculations.

3. Your name appears in the **Employee** field. Depending on your role access, you can select another employee if you're entering time for someone else.

   Note: For private tasks, only employees assigned to the task can track time against the task.

4. Enter information for this time transaction.

   For more information about entering time for Time Tracking, see the help topic Entering a Time Transaction.

   For more information about entering time for Timesheets, see the help topic Timesheets.
5. Repeat this process to track time for more customers or employees for this task.
6. Click **Save**.

For instructions on limiting employees' ability to enter time records, see the help topic Restricting Employee Time Tracking Entries . Employees can also use the Employee Center to track their time. For more information, see the help topic Giving an Employee Access to Time Tracking.

You can view employee time on the Reports page under the Time & Billables heading.

Tasks and Project Tasks Portlets on Your Dashboard

NetSuite offers two portlets to help you manage tasks. You can add a portlet to show CRM tasks and, if the Project Management feature is enabled, a portlet to display project tasks.

Tracking CRM Tasks

Use the Tasks portlet on your home page to track work you need to complete on CRM tasks.

If you use the Inline Editing feature, you can mark the task Completed in the Tasks portlet. Changes made to a task in the portlet automatically update the task record. You can also click Edit next to a task in the Tasks portlet to update the information about a task. For more information, see Using Inline Editing.

By default, the Tasks portlet displays each task's due date, title, company involved, priority, and status. To change the displayed fields, click Customize View on the portlet menu or choose from the View field if available.

You can also:

- Choose an option in the **Quick Sort** field to change the order in which tasks appear.
- Click **New Task** on the portlet menu to enter a new task record.
- Click **Set Up** to set how many tasks show in the portlet.
- Click the refresh icon to update the portlet after you update or complete tasks.

For information about working with CRM tasks, see Working with CRM Tasks.

Displaying Project Tasks

If you use Project Management, the Project Tasks portlet displays project tasks on your dashboard. The portlet shows project tasks assigned to all resources and offers quick access to project task information. For more info, see the help topic Project Tasks Portlets.

If you use the Inline Editing feature, you can change a project task's status in the Project Tasks portlet. Changes made to a task in the portlet are automatically saved in the task record. You can also click Edit next to a task in the Tasks portlet to update the information about a project task record.

By default, the project tasks portlet displays the project, task ID, task name, estimated work, actual work, start date, and end date for each task. To change the displayed fields, click Customize View on the portlet menu or choose from the View field if available.

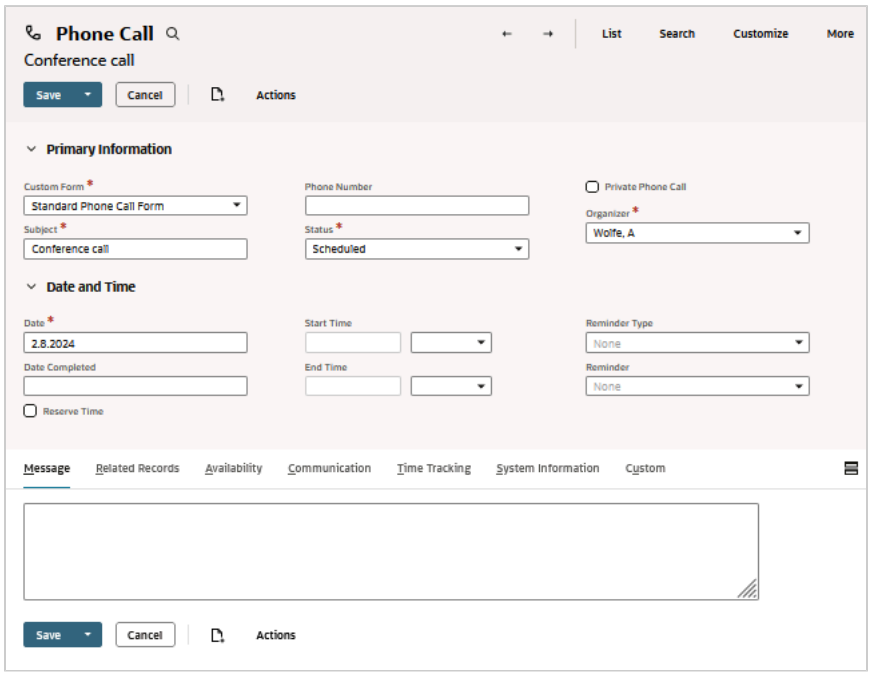
Use the portlet filter options to select the range of tasks to display in the portlet. Filter selections are saved until you change them.

- **Assignee** – Display all project tasks or only tasks assigned to a specific resource or group of resources. You can also select to display unassigned tasks.
- **Priority** – Select to view project tasks by importance.
- **View** – Make a custom database view if you want the portlet to show only some project tasks.
- **From-To** – View a range of tasks based on the project task column selected. For example, if you sort by task name, you can select a range of task names to display on the portlet.

For information about working with project tasks, see the help topic Project Tasks.

Working with Phone Calls

Use phone call records to document business calls. Phone call records include information about the call, such as the organizer and the date completed. You can also display phone calls on your NetSuite calendar and link the phone call to another record type, such as company, contact, or support case. After a phone call is linked to another record type, the phone call appears on the Activities subtab of that record.



For more information about working with phone calls, see the following:

- Scheduling or Logging Phone Calls describes how to create phone call records in NetSuite.
- Tracking Time on Phone Calls describes how to use phone call records in NetSuite to track time spent on each call. Note that you must use the Time Tracking for CRM feature to take advantage of this functionality.
- Making Calls From NetSuite describes how to make outbound calls directly from records in your NetSuite account.

Making Calls From NetSuite

When you use the Telephony Integration feature, you can initiate calls from the following pages in NetSuite:

- Relationship record lists
- Phone call list
- Phone call records
- Relationship records
- Saved search results that include phone numbers
- Subtab lists on records that include phone numbers
- Any record, list, or saved search with a phone custom field

Note: The Telephony Integration feature must be setup and enabled by your account administrator. See the help topic Using Telephony Integration. After the feature is enabled, users must set their personal preferences. See Personal Preferences for Telephony.

To make a call, click on the phone icon or underlined phone number from a list or record.

To end the call, hang up or click the next phone number to end the current call and begin a new call.

For example, you go to Activities > Scheduling > Phone Calls > Search and click Create Saved Search to create a search of the phone calls you need to make today. In your search results, click the phone icon next to the first phone number. Your phone rings to signal the call is ready. When you pick up the getr, the phone number is dialed, and your call is connected. To end the call, click the phone number of the next customer and continue with the process.

Scheduling or Logging Phone Calls

You can use phone call records to schedule calls and list them by due date and priority. Or you may use phone calls to document customer feedback whenever a customer calls you. NetSuite stores the information about a record in the Phone Call list on the customer record who calls and on the contact's record who called for the customer.

When you get a phone call from a customer, for example, go to the customer record, click Call in the New bar at the top of the record, and enter the details and reason the customer is calling.

To schedule or log a phone call:

1. Go to Activities > Scheduling > Phone Calls > New.
2. If you've created a custom form you want to use for this record, select that form in the **Custom Form** field.
3. In the **Subject** field, enter the main subject of the discussion.
4. In the **Organizer** field, select who is responsible for making the call. Your name appears here by default.
5. In the **Phone Call Date** field, enter the date the call is scheduled for.
6. Check the **Reserve Time** box to schedule this phone call on the calendar.

   If you want phone calls that don't reserve time on your calendar, check the **Display Non-blocking Phone Calls in Calendar** box on the Personal Calendar Preferences page at Activities > Setup > Calendar Preference.
7. If you're scheduling this call, select the **Start Time** and **End Time**.

   Use the **Availability** subtab to see when the organizer (you) and all added participants with NetSuite records are available.
8. In the **Date Completed** field, enter the date this call was completed if different from the scheduled date.
9. In the **Phone Number** field, you can enter the number dialed to make this call if it's different from the number of the participant selected below.
10. In the **Status** field, select whether this phone call is **Scheduled** or **Completed**.
11. Check the **Private Phone Call** box to display this call only in your list of calls. If you use Time Tracking for CRM, only employees listed as participants on the phone call record can track time against a private call.
12. If this is a scheduled call, select the **Reminder Type** you want:
    - **None** – No reminder is triggered.
    - **Email** – An email reminder is sent to the email address on the employee record for the person selected in the Organizer field.
    - **Popup** – A popup reminder opens when the organizer is logged in to NetSuite.

    You must also select a reminder time to set the reminder.
13. In the **Reminder** field, enter the time increment before the time set in the From field that a reminder should be triggered.

You must also select a reminder type to set the reminder.

14. On the **Message** subtab, enter notes or a description of the phone call.

    Optionally, you can get writing help for the **Message** field from our generative AI service, NetSuite Text Enhance. Click the Enhance Text button to use the available options. For more information about using this capability, see Text Enhance.

15. On the **Related Info** subtab, select a company if this call is related to a customer, vendor, partner, or other name.

    The **Contact** field lists the contacts for the entity you've selected.

16. In the **Contact** field, select the contact with whom this call is associated.
17. If this call pertains to a support case, select the case number in the **Support Case** field.
18. If this call is related to a transaction, select the transaction number.
19. On the **Participants** subtab, you can add listings for those participating in the call. Choices are available from the **Participant** dropdown list. Available choices include employees, customers, partners, vendors, and other names.
20. Attach files relating to this call on the **Files** subtab.
21. Click **Save**.

Your phone call is now documented. If the phone call was set as completed when it was created, it remains in the tasks list until it's marked Completed.

To mark a phone call Completed, go to Activities > Scheduling > Phone Calls and click Edit next to the phone call that has already been placed to open its record and change the status. If inline editing is enabled, you can change the status directly in the list. For more information, see Using Inline Editing.

Tracking Time on Phone Calls

Tracking time on phone calls helps you manage your company by making you aware of how much time is spent on the phone. The Time Tracking for CRM feature must be enabled to track time on phone calls. An administrator must enable the Time Tracking for CRM feature. For more information, see the help topic Enabling Time Tracking for CRM.

To track time on phone calls:

1. Go to Activities > Scheduling > Phone Calls
2. Click **New Phone Call** to create a new phone call, or click **Edit** next to the call you want to track time for.
3. Click the **Time Tracking** subtab.

   > **Note:** If any case, task, or event record has more than 9500 time entries on the Time Tracking subtab, all phone calls display a static list of time entries. You can't edit entries directly from the list.

4. Click **New Time**. A popup window opens with a new time entry form.
5. Your name appears in the **Employee** field. Depending on your role access, you can select another employee if you're entering time for someone else.

   > **Note:** For private calls, only employees and vendors listed as participants on the phone call record can track time against the call.

6. Enter information for this time transaction.

For more information about entering time for Time Tracking, see the help topic Entering a Time Transaction.

For more information about entering time for Timesheets, see the help topic Timesheets.

7. Repeat this process to track time for additional customers or employees for this call.
8. When you've finished entering information for this call, click **Save**.

Employees must enter their time in the Employee Center even if they also track time on phone calls.

Working with Email

You can send information using your NetSuite account and can track all communication between you and those you do business with. Whether it's email, letters, or phone calls, you can plan and manage everything right in NetSuite. See Sending Email from NetSuite.

You can also install NetSuite for Outlook which enables you to save messages from your Outlook mail account to NetSuite records. For more information, see the help topic NetSuite for Outlook.

For a complete list of accepted top-level domains you can use for setting up your email address, see the Internet Assigned Numbers Authority Web site.

For information about size limits for outbound and inbound email, see the help topic Size Limits for Emails and Attachments.

Transport Layer Security Support

NetSuite supports Transport Layer Security (TLS) for incoming and outgoing email messages. Note the following:

- TLS support applies only to the SMTP protocol.
- For outgoing email, TLS support depends on the recipient email server. NetSuite attempts to deliver outgoing email in an encrypted form, but if the recipient email server doesn't support encryption, email is delivered in plain text form.

Sending Email from NetSuite

You can send email to the people you do business with directly from NetSuite. For more information, see the following:

- Sending Email from Records
- Sending Email Directly from Lists and Records
- Emailing Transactions
- Sending Search and Report Results Email
- Attaching Files to Email Messages
- Customizing Email Signatures and From Fields
- Using Variable Envelope Return Paths

Email sent from NetSuite uses one of the following as the **From** address:

- the email address set in the From Email Address field at Home > Set Preferences > General under User Profile, or
- if there's no from email address entered on the Set Preferences page, the employee's login email address

When the recipient replies to your email, the reply goes to the address you used to send the original message.

For more information about where to find the sent email list, see the help topic Using the Sent Email List.

To generate the list of all email, you can use the Message record to define a saved search. For more information, see the help topic Saved Searches.

You can also send personalized email messages in bulk using the Email Merge feature. For more information, see the help topic Working with Mail Merge.

Working with Files Attached to Email Messages

Files attached from your computer to email you send from within NetSuite are stored by default in the Attachments Sent and the Attachments Received folders in the File Cabinet. These folders are also used when you save messages you receive outside of NetSuite to a record.

The attachment folders are system-generated folders in the File Cabinet only used to hold these files, so files in these attachment folders aren't available to select as attachments when sending email. If you want to attach a file from one of these folders to an email message, you must move the file to another folder prior to sending the email message.

For more information, see Moving and Copying Files in the File Cabinet. See also, Sending Email from Records.

Sending Email from Records

Email messages you send from NetSuite records are saved on the Messages subtab for each contact who receives the message as well as on the record you send the email from.

> **Note:** If you want your emails to include records of phone calls or tasks, for example, export them at Activities > Scheduling > Phone Calls into a file of your preference and send them manually.

You can email a contact from the following types of records:

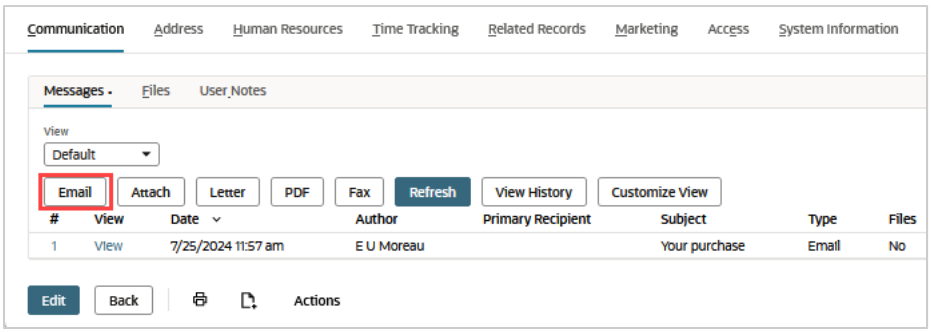
- Contact
- Customer
- Lead
- Prospect
- Vendor
- Company
- Other Name
- Partner
- Opportunity
- Transactions

To send email from a record:

1. On the record you want to send an email message from, click the **Communication** subtab. For some non-administrator roles and record types, click the **General** subtab.
2. On the **Messages** subtab, do one of the following:
   - If you're replying to or forwarding an email message, click **View** next to the email message, and then click **Reply**, **Reply to All**, or **Forward**.

     If you're replying, attachments aren't included by default, but you can add them on the **Attachments** subtab. Forwarded messages include attachments by default.

     > **Note:** You can't forward messages on employee records or on contact records that aren't associated with a company.
   - If you're sending a new email message, click **Email**.



3. On the **Recipients** subtab, select the contact you want to email in the **Recipient** field and enter an email address.
    1. In the **Recipient Type** field, select the record type you want to send the message to. This field is only visible if the **Recipient** has more than one type of relationship assigned, such as an employee who's also a contact. For more information, see the help topic Records as Multiple Types.
    2. In the **Additional Recipients** column, select the other contact you want to send this message to.
    3. In the **Email** field, enter an email address if the contact doesn't already have one set.
    4. Check the **To** box to add another recipient. This contact is expected to react to the message. Check **Cc** to send a copy, or **Bcc** to send a blind copy.
    5. Click **Add** for each contact you want to include.
4. Click the **Message** subtab.
    1. To use an email template in this message, select a category to filter the list of templates to show only those in this category.

       This field is only available if you have enabled the CRM Template Categories feature.
    2. Select a template you have uploaded to NetSuite.

       For more information about creating email templates, see the help topic Creating New Email Templates.
    3. Check the **Update** box to update your template with any edits you make in the **Message** field.
    4. In the **Subject** field, enter a subject for this message. This field is required.
    5. Check the **Request Read Receipt** box to request read receipts from individual recipients.

       For more information about creating email templates, see Requesting Read Receipts.
    6. Choose the template format you want to use for this message.

       For more information, see the help topic Creating New Email Templates.
    7. Use the **Field Type** field and the Insert Field to add field tags in your message.
    8. In the **Message** field, enter your email message. NetSuite uses your browser's spellchecker to check your text. Click CTRL + right-click to view the context menu and select the correct spelling.

       If you selected a template file, you can edit the message in this field.

       > **Note:** You can send an inline picture by copying and pasting the picture into the message field.
5. Click the **Attachments** subtab.

1. Check the **Zip Attachments** box to compress the files you're sending.
2. In the **Attach Document Template** field, select a letter template to format your attachment.
3. To attach a statement to this message, check the **Include Statement** box, and select the date of the statement.
   - In the **Start Date** field, you have the option of entering the date of the oldest transaction you want to appear on the statement.
   - In the **Type** field, you can select the type of statement to attach.
   - You can enable the **Show Only Open Transactions** option to include only open transactions in the attached statement. If you enable this option and don't enter a start date, the statement includes all open transactions in the customer's history.
4. In the **Attach File** column, select the file from your File Cabinet you want to attach to this message. Select **New** to upload a new file from your hard drive. Email attachments must be 5MB or smaller.

   > **Note:** You can't associate a file in the **Attachments Sent** or **Attachments Received** folders with records or transactions. You must first move the file to another folder. For more information, see Working with Files Attached to Email Messages.

5. Click **Add** after each attachment you want to add.
6. Click **Send**, or if you're using the Mail Merge feature, click **Merge & Send**. For more information, see the help topic Working with Mail Merge.

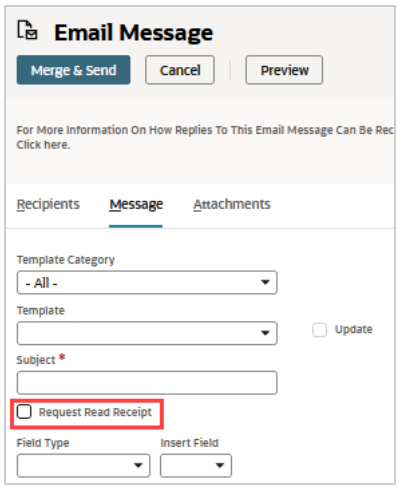
If contacts for your customers, vendors or partners reply to the email you send from NetSuite, that reply is both sent to the email address you log in with and automatically saved to the Messages subtab of the contact record and customer, vendor or partner's record.

You can also save messages you receive. For example, if you receive a phone call from a customer contact, you can record the message of the call on the customer's record. For more information, see the help topic Saving Messages from Contacts.

> **Note:** If you use the UK Edition, to comply with UK law, your business address and VAT number are included in the footer of all email you send to those outside of your company. You can click View History to view all messages sent to and from contacts.

Requesting Read Receipts

Read receipts ensure that recipients have received a message, which is important when sending important information or time-sensitive transactions. With NetSuite, you can add read receipts on outgoing email messages to individual recipients.



When you check the Request Read Receipt box on an email message in NetSuite, the recipient's email client gets a read receipt request. Email clients handle read receipt requests in various ways. Different email clients handle these requests differently, and the recipient can usually choose whether to send a read receipt when they open your message. All received read receipts are forwarded to the original sender of the message and tracked on the message record in NetSuite, providing an audit trail within the application. You can view the status of read receipts on the Read Receipts subtab of a message record.

The status may be one of the following:

- **Confirmed** — The message was displayed to someone reading the recipient's mailbox. There's no guarantee that the content has been read or understood.
- **Message Deleted** — The message was deleted without reading. There's no guarantee that the recipient has seen the message

Sending Email Directly from Lists and Records

In NetSuite, you can send email to your business contacts directly from NetSuite lists and records using your personal email account.

Important: These messages aren't saved in NetSuite, and you won't receive replies to these messages in NetSuite.

To send email from a list:

1. On the **Lists** tab, under the Relationships heading, select the type of record for the person to whom you want to send an email (such as customer or vendor).
2. If the email address isn't already showing in the list, make a selection in the **View** filter of the list to display a list with an **Email** column. (For example, the **All** view and the **Basic** view include an **Email** column.)
3. Click the **Compose Email** icon next to an email address. This opens a new message window in your personal email account with the **To** field completed.
4. Enter a subject and message text, and click **Send**. Then you can continue working in NetSuite.

Tip: NetSuite uses your browser's spellchecker to check your text. Click CTRL + right-click to view the context menu and select the correct spelling.

To send email from a record:

1. On the record, click the icon next to an email address for a contact. This opens a new message window in your personal email account with the **To** field completed.
2. Enter a subject and message text, and click **Send**. Then you can continue working in NetSuite.

Sending Search and Report Results Email

You can send email containing results from searches and reports of NetSuite data to other users.

An Email button is available on most report and search results pages.

- For information about sending email directly from a report results page, see the help topic Emailing a Report.
- For information about sending email directly from a search results page, see the help topic Emailing Search Results.

If you're an administrator or have at least Create level of the Publish Search permission, you can enable system-generated search email messages on the Email subtab of a saved search page. Use saved search email to share complete search results with other users, to schedule long-running searches for low usage times, and to alert targeted users about changes to their important records. For more information, see the help topic Saved Search Email.

Attaching Files to Email Messages

You can attach documents including PDFs to email messages sent through NetSuite.

Note, however, that files in the Attachments Sent and the Attachments Received folders can't be attached. These are system-generated folders and they're used as repositories for files you attach from your computer to email messages you send from NetSuite and also for files attached from messages you save in NetSuite.

If you want to attach a file from one of these folders, move it to another folder before sending your email. For more information, see Moving and Copying Files in the File Cabinet.

> **Note:** Email messages can't exceed 15,000,000 bytes (approximately 15 MB) in size. This includes the size of the message body and all attachments.

To attach a file to an email message:

1. On the Email Message popup, click the **Attachments** subtab.
2. Check the **Zip Attachments** box if you want to compress the files you're attaching.
3. In the **Attach File** column, select the file and click **Add**. Repeat this for each file you want to attach.

   > **Note:** You can't select files from the Attachments Sent and the Attachments Received folders here.

4. When you're finished composing your email, click **Merge & Send**.

Customizing Email Signatures and From Fields

You can set up an email profile to determine the following for email you send through NetSuite:

- the name that appears in the From field
- the From email address
- a custom signature

To set up your email profile:

1. Go to Home > Set Preferences, in the User Profile area of the **General** subtab.
2. In the **Nickname** field, enter the name you want to appear in the **From** field on the email you send.
3. In the **Signature** field, enter an email signature using HTML markup.

   For information about how to create an HTML signature file, see Adding Images and Links to an Email Signature.

   > **Note:** You can enter up to 4000 HTML characters in this field.

4. In the **From** Email Address field, enter the email address you want to appear in the From field on email you send.
5. Click **Save**.

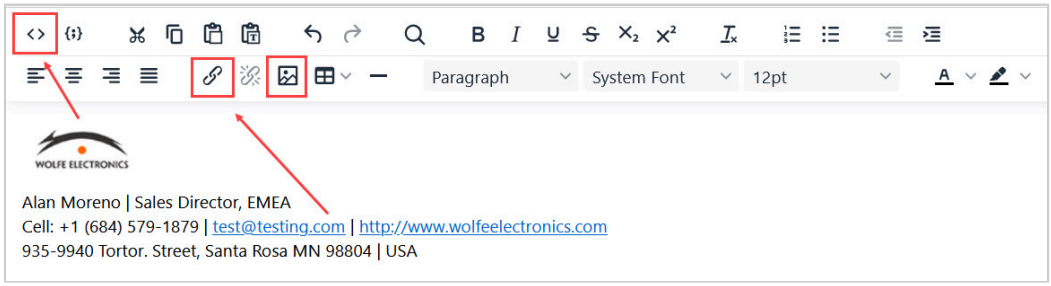
To include your email signature, you must include the following FreeMarker syntax in the email: `${preferences.message_signature}` You can also place this marker in email templates. If you don't enter a nickname or a From address, your login email address appears in the From field.

Adding Images and Links to an Email Signature

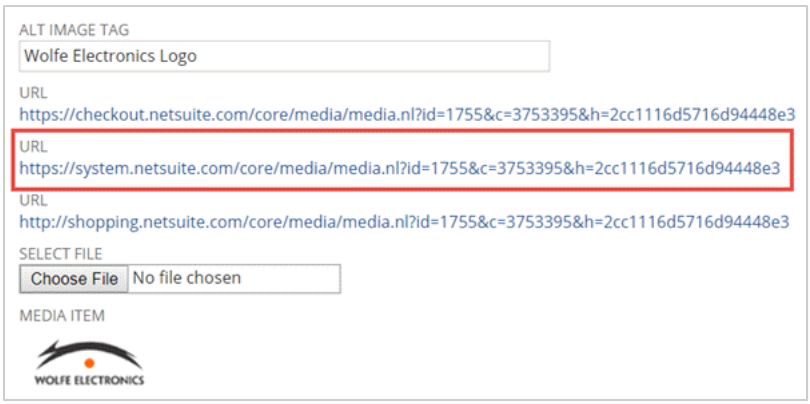
If you aren't familiar with HTML, the simplest way to create an email signature containing rich-formatted text, images and links, is to use NetSuite email editor. You can either access the editor from an entity record (Customer, Company, Lead, and others) by clicking the Communications subtab > Messages > Email. Or use the following procedure to access the editor from Email Templates. The editor is the same in all cases.

To create an email signature using NetSuite email editor:

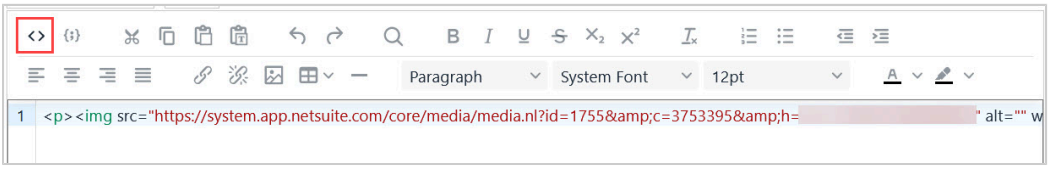
1. Go to Documents > Templates > Email Templates > New.



2. Enter your signature information in the editor.
3. Optional: to add an image to a signature, first make sure the image has been uploaded to the File Cabinet. See Uploading Files to the File Cabinet.
   a. Open a new browser tab/window and go to Documents > Files > File Cabinet.
   b. Locate the required image file and click **Edit**.
   c. Copy the URL which begins **https://system.netsuite.com/**.



4. Go back to the email editor. Click the image icon (top left hand corner of editor).
5. Paste the File Cabinet image URL into the **Source** field. Set the size and alignment as needed. Click **Save**.
6. Switch to the editor's markup view by clicking the Source code icon (top left corner of editor).
7. Copy all lines of the markup code.
   a. Optional: save the email template if you want to use it again later.
   b. Discard the template file.



8. Go to Home > Set Preferences.
9. Clear any existing content from the **Signature** field, and paste in the copied HTML.
10. Check the **Add Signature to Messages** box.
11. Click **Save**.

For more information about how to create, modify, and delete email templates, see the help topic Working with Email Templates.

File Cabinet Overview

Only users with the Administrator role and users with the Documents and Files permission can use the File Cabinet.

You can use the NetSuite File Cabinet to store and organize your business documents in much the same way as you store any files on your computer. You can store files that you receive or plan to send by email and you can attach files from the File Cabinet to records in NetSuite, such as customer records, transactions, and issues. Most File Cabinet folders can be restricted by the folder owner or an administrator.

The File Cabinet in NetSuite includes some folders that are created by default, depending on the features enabled in your account. You can identify folders created by NetSuite because the Internal ID is a negative number. In some cases, these folders serve a specific purpose. For example, SuiteScript script files are stored in the SuiteScripts folder.

Some files in the File Cabinet contain links that use URLs. Ensure that the URLs linking to those files contain account-specific domains. For example, the File Cabinet link should be *<accountID>*.app.netsuite.com, where *<accountID>* is a variable representing your account ID. Use the Traffic Health tool to identify any existing data center-specific domains in links that you should update to account-specific domain links. For more information, see the File Cabinet Traffic Health topic in Traffic Health.

Permissions in the File Cabinet

Your NetSuite account configuration or configuration of other critical business systems may depend on data in files stored in your NetSuite File Cabinet. In the File Cabinet, you can't restrict edit access at the file level. You can restrict access only to the folder that contains the file. You should set strict access control for which classes of users can edit or, if applicable, view those files in specific folders. Otherwise, a user may be able to change the configuration data in the file. A configuration change can potentially break the system or cause it to work in a way in which it was not intended.

Consider a critical workflow system that relies on a configuration containing a value APPROVER=email@example.com, and this configuration is accessed from a File Cabinet file. If a user edits the configuration file, they could change the email address and bypass the approval process. Ensure that only authorized users can edit the file. For more information, see Restricting Access to File Cabinet Folders.

You can block unauthorized internet access to a File Cabinet file, or let everyone in your company view the file by checking the required preference box. For more information, see Preferences on File Records.

System Notes in the File Cabinet

Every file you add to the File Cabinet has a system notes record to track changes made to the file, including the context and when the changes were made. For more information, see the help topics System Notes Overview and Searching System Notes.

System notes for JSON, XML, and JavaScript files also include a File Content Hash field. NetSuite calculates the File Content Hash field based on the file contents, so it changes every time the file changes.

For remote files that you add to the File Cabinet using a URL, the File Content Hash field changes when you download this file or its parent folder from the File Cabinet. The value of the File Content Hash field

also changes when NetSuite accesses the file through an internal process, such as a SuiteScript method call, or a SuiteFlow workflow step. This change is reflected in the system notes for that file.

The File Cabinet and Your Website

If you use Site Builder or SuiteCommerce Advanced, all website assets, including SSP Applications, are stored in the Website Hosting Files folder. For more information, read the following topics:

- For information about hosting HTML files for a Site Builder website, read the help topic Website Hosting with Site Builder.
- For more information about SSP Applications, read the help topic SSP Application Overview.
- For more information about SuiteCommerce Advanced, read the help topic Commerce Website Developer Documentation Overview.

You can also create a company intranet site and post links to files stored in the File Cabinet. The following features are required to publish files to an intranet site:

- File Cabinet
- Document Publishing
- Intranet

File Cabinet Page Overview

When the File Cabinet feature is enabled, users with the Administrator role and users with the Documents and Files permission can access File Cabinet files. Roles and permissions affect which document folders are visible to users. For more information, see the following topics:

- Enabling Features
- Setting Permissions
- Permissions and File Cabinet Files

To access the File Cabinet, go to Documents > Files > File Cabinet.

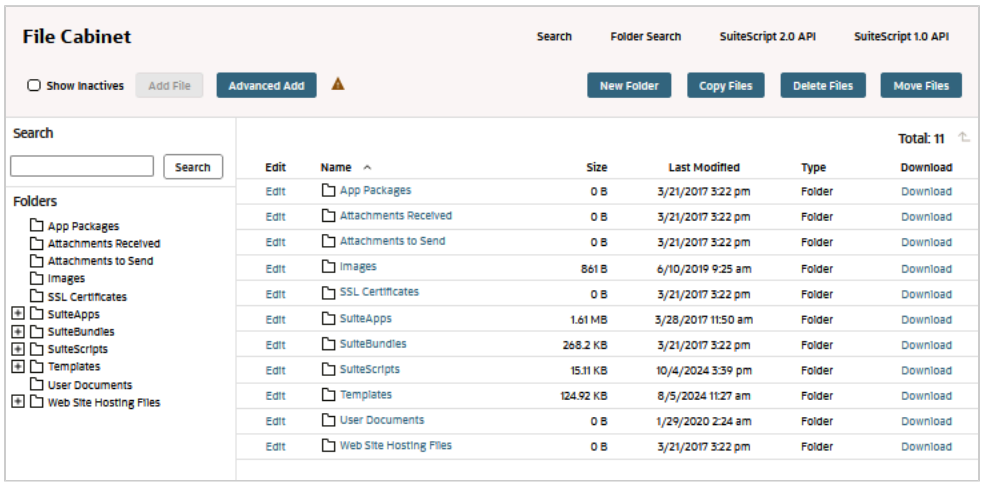
The File Cabinet page consists of two main panes. The left pane shows a full table of contents which you can use to browse the folder structure and find the files you need. The right pane provides more detailed information about the folders or files such as size, last modified date, and type. To download a file or the contents of a folder, click the related Download link.

On the File Cabinet page, you can also:

- Create new folders
- Add, copy, delete and move files
- Search for files

Note: You must have the Full level of the Documents and Files permission to delete files from the File Cabinet.

The following screenshot shows an example of the File Cabinet page:

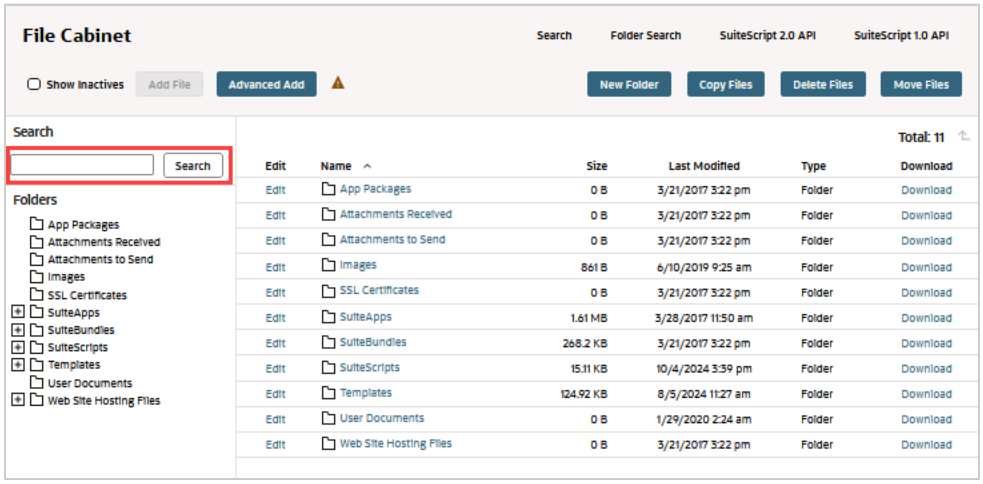


Searching for and Viewing Files in the File Cabinet

From the File Cabinet page, you can view and search for File Cabinet folders and files.

Searching for Files in the File Cabinet

To search for a file, enter a keyword in the Search box and click Search. A list of files and folders displays in the right panel. You can search using keywords from file and folder names.



You can click a file name to view the file. If the file is an image or PDF, a preview window opens. Other file types download automatically.

If you want to print a report of files saved in the File Cabinet, use NetSuite search pages. For more information, see the help topic Simple and Advanced Searches.

Viewing a File in the File Cabinet

You can view the files available in the File Cabinet.

To view a file in the File Cabinet:

1. Go to Document > Files > File Cabinet.
2. To view a list of files within that folder, click the folder name.
3. To view the file, click the file name.

Viewing a File Attached to a Customer or Other Record Type

You can view files attached to a customer or other record type.

To view a file attached to a customer or other record type:

1. Find the record where the file is attached.
2. Click the **Communication** subtab.
3. Click the **Files** sublist.
4. Click the file name.

Permissions and File Cabinet Files

Users with the Administrator role and users with the Documents and Files permission can access File Cabinet files. For more information, see the help topic Setting Permissions.

> **Note:** Users without the Documents and Files permission can access the content of files if they're provided with a URL that's based on file ID, and if the file is related to a record the user has access to. For example, if a user with the Customer Center role uses a URL to access a file on an invoice, they also must have access to the invoice record.

Using Permissions in the File Cabinet

This is the second video in a 2–part series of videos about the File Cabinet. To watch the first part of the series, go to Working with Files.

Note that you can't restrict files on an individual basis. To learn about how to restrict access to files in certain folders, read Restricting Access to File Cabinet Folders.

For information about preferences that you can set for your file records, see Preferences on File Records.

When you use OneWorld, access to various NetSuite records, including File Cabinet files, can be restricted by subsidiary. For more information, read the following topics:

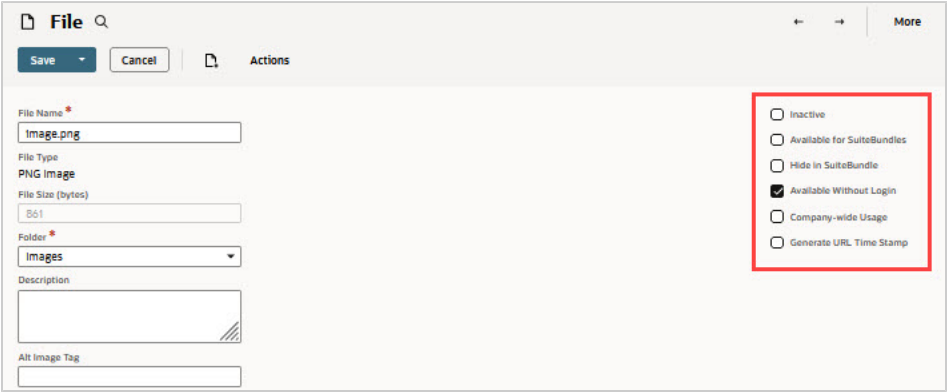
- Control Employee Access to Subsidiaries
- Customizing or Creating NetSuite Roles
- Restrict Your Subsidiary View

Preferences on File Records

When you edit your files in the File Cabinet, you can check the following boxes:

Preference	Description
Inactive	Prevents files from appearing on lists. When you check this box, the file or files no longer appear on lists unless you check the Show Inactives box.
Available for SuiteBundles	Makes the file available to include in a bundle. **Note:** If you include this file in a bundle, clearing this box doesn't remove the file from the bundle. If you want to remove the file from a bundle, you have to update the bundle and remove the file.
Hide in SuiteBundle	Prevents the viewing of the file contents by those who install this file as part of a SuiteBundle. This setting is most applicable to server SuiteScripts. **Note:** If this file is a client SuiteScript file, checking this box results in a validation error. You may also get a validation error on client SuiteScript files that don't have this box checked but reference another file that has this preference set.
Available Without Login	Makes the file available on your website. If files won't be published on your website, clear this box. Note that Available Without Login takes precedence over Company-Wide Usage. This box is checked by default in the Images folder and the Web Site Hosting Files folder. **Note:** Users with the Administrator role can also use Web Site Hosting Files Always Available and SuiteBundle Files Always Available preferences. For more information, see the help topic Making Web Site Hosting Files Always Available.
Company-Wide Usage	Adds view access to a file for every company user. For example, if an image used in an email message is marked for company-wide usage, all company users can view the image. You can make a file available for all company users, even if the file is within a private folder or otherwise inaccessible to a specific group. When you enable the Company-Wide Usage feature, company users with existing permission to edit the file continue to have both view and edit access. Other company users can only view the file. The Company-Wide Usage feature applies to all centers and roles, including users with specialized center roles. For more information about specialized centers, see the help topic NetSuite Specialized Centers. Note that **Available Without Login** takes precedence over **Company-Wide Usage**. If this box isn't checked, the file won't be available in any advanced template printouts that reference the file. You can also perform a mass update to define a list of files that should be available for company-wide usage. For more information about mass updates, see the help topic Mass Updates. You can configure an image available in an advanced printing template to make it available to all company users. For more information, see the help topic Including Images in Advanced Templates.
Generate URL Time Stamp	Adds a time stamp parameter to the URL for this file. This is useful when you're building a web site and you want to view the most recent updates to the files on your site. The URL time stamp is ignored by NetSuite but indicates to the browser cache and network that content has changed.

The following screenshot shows the location of preferences on a file record:



Users with the Administrator role can make files in the Web Site Hosting Files and SuiteBundles folders always available to override the Available Without Login box and the Company-Wide Usage box. For more information, see the help topic Making Web Site Hosting Files Always Available.

FreeMarker Directive for Company-Wide Usage

When the Company-Wide Usage box is checked in the File Cabinet, the **filecabinet** FreeMarker directive is used in the source code. In WSYISWG mode, this directive is added automatically. If you edit templates in the source code, you can use the **filecabinet** FreeMarker directive to reference files directly from the File Cabinet.

For more information about the filecabinet FreeMarker directive, see the help topic Syntax for Advanced Template Fields.

For more information about setting the File Cabinet property, see the help topic Including Images in Advanced Templates.

File Cabinet Folders

You can use folders to organize the files in your File Cabinet. Permissions applied to File Cabinet folders determine who can see files stored there. You can create your own folders, but some folders already exist in the NetSuite File Cabinet by default. If you use the Web Store feature or the Marketing Automation feature, a folder already exists where you can store your files for these purposes.

You can also restrict access to files in folders that you create. For more information, read Permissions and File Cabinet Files.

Creating File Cabinet Folders

Users with the Administrator role and users with the Documents and Files permissions can create File Cabinet folders. For more information, see the help topic Setting Permissions.

To create a new File Cabinet folder:

1. Click the **Documents** tab.

2. On the File Cabinet page, click **New Folder**.
3. In the **Folder Name** field, enter a name for this folder.

   You'll select this name when you attach documents and images to records.
4. In the **Sub-Folder of** field, select this folder's parent folder if one exists.

   > **Note:** Large file sizes and many subfolders may affect performance and slow down processing time when you're working with the files and folders. Avoid creating large numbers of subfolders wherever possible. If you try to move files to another folder using the Move To dropdown list, the number of displayed folders is limited to 20,000. Furthermore, you shouldn't create more than 50,000 subfolders because it becomes increasingly difficult to organize files in a large number of subfolders. If you do need to use many subfolders, use the mass update files method to move files around. For more information, see the help topic Defining a Mass Update.
5. NetSuite populates the **Type** field with the appropriate type for the subfolder selected. In most cases, the field is set to **Documents and Files**.
6. In the **Description** field, add a short note describing what you store in this folder.
7. You can restrict the folder based on various classification settings in your account. Only users with the selected settings can access the files in the folder. Folder contents don't appear in searches or any other area of NetSuite for users outside of the selected class, department, location, group, or subsidiary. Users with the Administrator role and the owner of this folder can always access the contents of this folder.

   Complete the restriction fields, as required. For more information, see Restricting Access to File Cabinet Folders.
8. If you want to make the contents of this folder visible only by you, check the **Private** box.
9. If you want to make this folder inactive, check the **Inactive** box.
10. If the **User Notes** subtab is displayed, add any notes pertaining to this File Cabinet folder, as needed.
11. Click **Save**.

Your folder is immediately available in the File Cabinet. You can upload files to the folder. The files are available to others who have access to your NetSuite account, based on the restrictions you set on the folder.

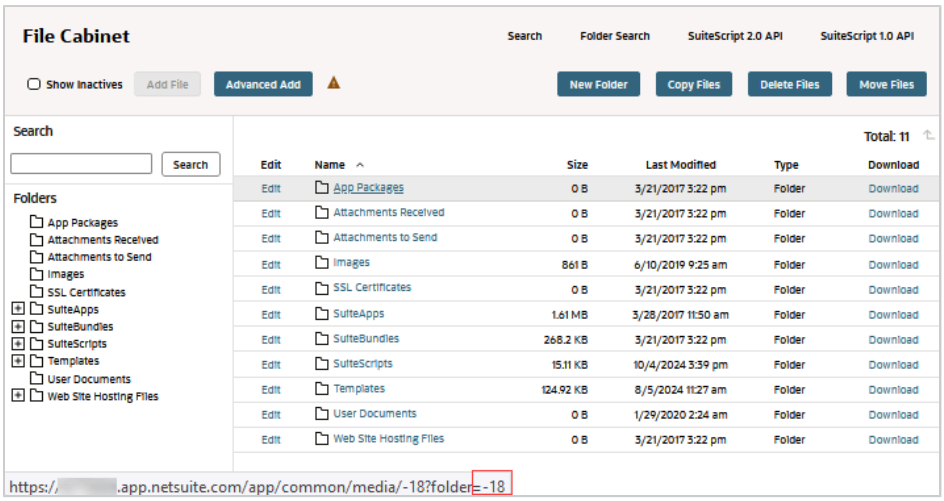
If you want, you can create a shortcut that will appear in the Shortcuts portlet on your NetSuite page. For more information, see Creating a Shortcut to a File Cabinet Folder.

Creating a Shortcut to a File Cabinet Folder

In the Shortcuts portlet on your NetSuite Home page, you can add links to the File Cabinet folders you use most often. To create a shortcut for a folder, use the folder's internal ID to create a URL that points to the folder. Next, use the URL to set up a new shortcut in the Shortcuts portlet.

To create a shortcut on your NetSuite Home tab:

1. Click the **Documents** tab.
2. Find the internal ID for the folder.
   a. Point to the folder name as shown in the following sample screenshot.



b. Find the internal ID for the folder. The internal ID displays at the bottom left of the browser window. You can also set your personal preferences to display the folder internal IDs on the File Cabinet page. For more information, see General Personal Preferences.

3. Click the **Home** tab.
4. In the Shortcuts portlet, click **New Shortcut**.

> **Note:** If you don't see the Shortcuts portlet on your **Home** tab, click **Personalize** in the upper right, and then select **Shortcuts** in the **Personalize Dashboard** area.

5. Add your folder's internal ID to the end of the URL that displays a File Cabinet folder: https://*<accountID>*.app.netsuite.com/app/common/media/mediaitemfolders.nl?folder=

   For example:

```
https://<accountID>.app.netsuite.com/app/common/media/mediaitemfolders.nl?folder=8
```

   For more information, see the help topic Shortcuts Portlet.

6. Click **Save**.

After creating the shortcut, you can go directly to this folder by clicking the link in the Shortcuts portlet on your NetSuite Home page.

Restricting Access to File Cabinet Folders

Within your organization, you can restrict access to files by setting permissions on File Cabinet folders. You can't restrict individual files, but you can restrict access to the enclosing folder. You can set permissions based on various criteria, such as location and department.

When a folder is marked as private, only the person who created that folder and the account administrator have access to it. Administrators can view the contents of any folder, including private folders and folders that have been restricted. If you create a folder, you become the owner of that folder. The owner of a folder always has access to the folder regardless of restrictions.

Restricting Access to Subfolders

Note the following when you restrict access to a folder with subfolders:

- If a subfolder is created under a parent folder **after** the parent folder was restricted to a group, the subfolder automatically inherits the parent folder's restriction. You can change the subfolder's restriction.
- If a parent folder's restriction is changed **after** a subfolder was created, the subfolder doesn't automatically inherit the new restriction. You can manually apply the restriction to the subfolder.

To change the restricted access setting in a folder:

1. Log in to NetSuite with a role that has access to the folder.
2. Go to Documents > Files > File Cabinet.
3. Click **Edit** on the folder to which you want to restrict access.
4. To restrict access in the following categories, select from the dropdown lists. Note that the following list names may be different depending on record naming customization in your NetSuite account:
   - Restrict by Class
   - Restrict by Department
   - Restrict by Location
   - Restrict by Group. If you choose a dynamic group, for performance reasons, the folder is restricted to a snapshot of the dynamic group members. The snapshot is updated twice a day. For more information, see Working with Groups.
   - Restrict by Subsidiary. Note that employees assigned to the parent subsidiary can access all child subsidiary folders. To change this behavior you can restrict the folder by group. For more information, see File Access Restriction by Subsidiary in File Cabinet (SuiteAnswers ID: 35400).
5. Click **Save**.

All files in the folder are available based on the restricted access settings you selected.

Deleting Folders from the File Cabinet

Users with the Administrator role and users with the full Documents and Files permission can delete File Cabinet folders. For more information, see the help topic Setting Permissions.

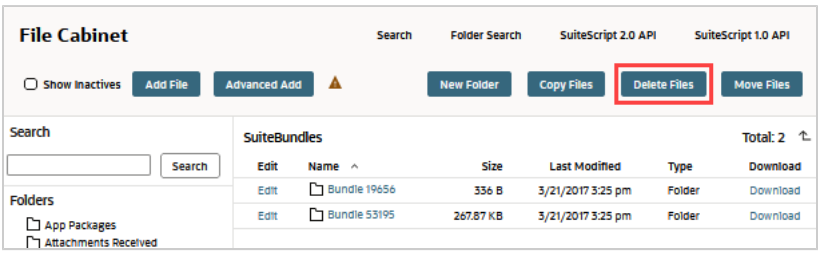
You can delete a folder that contains files and subfolders, or you can delete an empty folder. If the folder contains a file that's attached to a record, the delete operation fails. A popup alert displays indicating that you must remove the file from the record to continue.

Deleting a Folder Containing Files

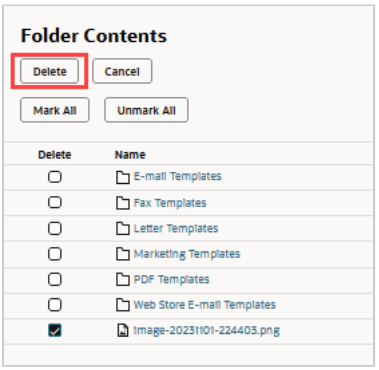
You can delete a folder that contains files you no longer need.

To delete a folder containing files:

1. Go to Documents > Files > File Cabinet.
2. Locate and click the parent folder of the folder you want to delete.
3. Click **Delete Files**.



4. A list displays of files and subfolders in the parent folder. Check the box next to the folder you want to delete.



5. Click **Delete**.

Deleting an Empty Folder

You can delete empty folders from the File Cabinet.

To delete an empty folder:

1. Go to Documents > Files > File Cabinet.
2. Locate the empty folder you want to delete.
3. Click **Edit** next to the folder name.
4. Expand the **Actions** menu.
5. Click **Delete**.

Working with Files

This section includes information about what you can do on file records in NetSuite.

NetSuite Basics: Working With Files in the File Cabinet

This is the first video in a 2–part series of videos about the File Cabinet. To watch the second part of the series, go to Using Permissions in the File Cabinet.

Uploading Files to the File Cabinet

You can upload a file by clicking the Documents tab, and then selecting a folder. NetSuite accepts all file formats in the File Cabinet. The File Cabinet shows the file extension and lists the file type. You can also upload files by clicking the Communications subtab on transaction records and relationship records.

When you attach files to records, you must select or create a folder where the document can be stored in the File Cabinet.

If Use Employee Specific Expense Folders is enabled, expense file attachments automatically submit to a dedicated employee expenses folder, predefined by the system.

You can make files available to everyone in the company, even if the file is in a private folder or not accessible to a specific group. To do this, check the Company-Wide Usage box on the file record. For more information, see Preferences on File Records.

All files uploaded to the File Cabinet are automatically scanned for viruses and malicious content. For more information, see the help topic Antivirus Scanning on File Cabinet Files.

To upload files to a File Cabinet folder:

1. Click the **Documents** tab.
2. In the right pane, click the name of the folder where you want to store files.

   If the Use Employee Specific Expense Folders feature is enabled, expense file attachments are automatically uploaded to a system-defined employee expenses folder.
3. To upload a file from your computer, click **Add File**.
4. To add a file from the internet, or to add a .zip file, click **Advanced Add**.
   a. To upload a .zip file, in the **Zip Archive to Add** field, click **Choose File**, and select the file you want to upload. Click **Open**.
   b. In the **Character Encoding** field, choose the proper character encoding for the file.
   c. To upload a file from the internet, in the **URL** field, enter URL path for the file location on the internet. Make sure the length of the URL isn't longer than 250 characters.

      Note: When a remote file that was added to the File Cabinet using a URL is modified, the File Content Hash field changes when you download this file or its parent folder from the File Cabinet. The value of the File Content Hash field also changes when NetSuite accesses the modified file through an internal process, such as a SuiteScript method call, or a SuiteFlow workflow step. This change is reflected in the system notes for that file. For more information, see File Cabinet Overview.

   d. Verify that the **Destination Folder** is where you want to upload the files.
   e. To automatically extract files into the Destination folder as they're uploaded, check the **Unzip files** box.
   f. (Optional) To make the files available on your website, check the **Make all Files Available Without Login** box. If you don't want to publish the files on your website, clear this box. Note that **Make All Files Available Without Login** takes precedence over **Make All Files Available for Company-Wide Usage**.

      Note: Enabling the Files Available Without Login capability prevents broken images and links in your website. This box is checked by default in the Images folder and the Web Site Hosting Files folder.

   g. (Optional) To make the files available to all company users, check the **Make All Files Available for Company-Wide Usage** box.

      Note: When the box is checked, files are also available for viewing in the Customer, Vendor or Partner Centers.

   h. To overwrite files that exist in the File Cabinet with the files in the .zip file, check the **Overwrite Files with Same Name** box. When the box is checked, files of the same name

are automatically updated with the latest version you upload in this archive. When this box is cleared, files in the .zip archive that have the same path and name as existing files in File Cabinet aren't extracted to the File Cabinet. The same rules apply to individual files uploaded using a URL path.

Only users with the Administrator role and users with the Edit level permission or higher can overwrite files in the File Cabinet.

> **Important:** This setting doesn't apply to locked files and folders that have been installed by a bundle. You can't edit or overwrite locked files and folders installed by a bundle.

i. To upload the.zip file, click **Add**.

To inactivate files being added using the Advanced Add form, check Make all Files Inactive. When you check this box, the file or files no longer appear on lists unless you check the Show Inactives box.

> **Note:** Users with the Billing Information permission can look up the amount of space the File Cabinet currently uses on the Billing Information page. Go to Setup > Company > View Billing Information. The Current Used Quantity column for File Cabinet Size (GB)** component shows the current amount of space used.

Additional Information:

- Attaching Files to Records
- Attaching Files to Email Messages
- Best Practices for Preparing Files for Upload to the File Cabinet
- Unsupported Symbols in File Names

> **Important:** Unless you've purchased additional storage space, each NetSuite account comes with 10 GB of total storage space.

Unsupported Symbols in File Names

The following characters aren't supported in file names uploaded to the File Cabinet. Even if your operating system allows these characters, you should avoid using them as they can cause unexpected behavior when used on systems and browsers that don't support them. This is especially important when adding multiple files to a ZIP archive, as these files can't be pre-validated.

Also note that zip files containing file names with international characters are supported only if they meet the following conditions:

- The file names of the zip entries are encoded in UTF-8.
- Special **general purpose bit 11** (UTF-8 flag) is set according to APPENDIX D -Language Encoding (EFS)) paragraph D.1 and D.2 of the PKWARE official zip documentation.

When zipping your files, you should use a dedicated zipping application that supports these conditions.

> **Note:** The preceding information is applicable to the file names only, and isn't related to the content of the zipped files.

Character	Description
:	colon

/	forward slash
?	question mark
<	single left-pointing angle quotation mark
>	single right-pointing angle quotation mark
\	backslash
*	asterisk
|	pipe (vertical bar)
“	quotation mark
%	percentage sign
&	ampersand
#	number sign, hash

Best Practices for Preparing Files for Upload to the File Cabinet

The following list contains best practices for preparing your files for upload to the File Cabinet:

- When uploading files, include the file extension according to the file type. For example, PDF files must include the file extension **.pdf**.
- Work with files of 100 MB or smaller. Note that various factors may affect the time it takes to upload and download files greater than 100 MB, such as network speed, time-out settings, and overall space limitations.
- Use file names that contain fewer than 99 characters, including the extension.
- Ensure that any File Cabinet files containing URL links use account-specific domains. For more information, see the File Cabinet Traffic Health topic in Traffic Health.

Editing Files in the File Cabinet

The procedure you use for editing a file depends on the file type you're working with. You can edit many file types directly on the file record. Other files, you must download to your computer, make your changes, and upload the files again.

When you edit your file records in the File Cabinet, you can update your preferences to grant or restrict access to your files. For more information, see Preferences on File Records.

- Editing Files Directly
- Editing Other File Types Stored in the File Cabinet
- Making a File Cabinet File Inactive

Editing Files Directly

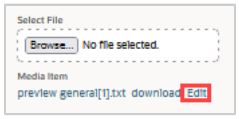
You can edit files that are 512 KB or smaller directly on the file record. The following file types support direct file editing:

- HTML

- Plain Text
- CSS
- XML
- JavaScript
- CSV
- SuiteScript Page
- SuiteScript File
- Text

To edit a file directly:

1. Click the **Documents** tab.
2. Click a folder to find the file you want to edit.
3. Click **Edit** next to the file you want to edit.
4. Click **Edit** on the file record to open the file content screen.



5. Make your changes.
6. Click **Save**. Your changes are saved when you click Save in the file content screen. Note that the file content is changed, but settings on the file record aren't changed.

Editing Other File Types Stored in the File Cabinet

The process of editing file types other than the ones listed earlier and files larger than 512 KB is different. First, you must download the file from the File Cabinet, modify it on your computer, and then upload the file to replace the previous version.

To edit larger files and other file types stored in the File Cabinet:

1. Click the **Documents** tab.
2. Click a folder to find the file you want to edit.
3. Click **Edit** next to the file.
4. Click **download** on the file record.

5. Make your changes on your computer, and then save it.
6. Click **Choose File** on the file record in NetSuite to select the updated file on your computer.

7. Click **Save** on the file record.

Making a File Cabinet File Inactive

You can inactivate files that are referenced by other records in NetSuite.

To make a file inactive:

1. Click the **Documents** tab.
2. Click a folder to find the file you want to edit.
3. Click **Edit** next to the file you want to edit.
4. To make the file inactive, click the **Inactive** box. You can make the file active again at any time by clearing the **Inactive** box.
5. Click **Save**.

Moving and Copying Files in the File Cabinet

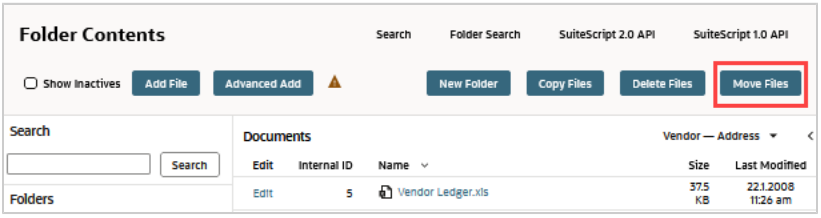
You can move files between folders in your File Cabinet. You can also copy files to other folders.

Moving Files in the File Cabinet

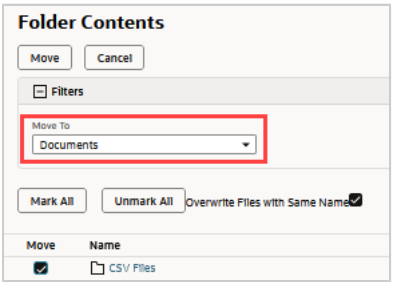
Moving files lets you transfer files to different folders in your File Cabinet.

To move a file:

1. Click the **Documents** tab.
2. Go to the folder that contains the file you want to move.
3. Click **Move Files**.



4. Check the box next to the file you want to move. You can move more than one file at a time.
5. Under the **Filters** subtab, select **Move To**. Then, select the folder where you want to move the file.



6. When you've finished, click **Move**.

The selected file is now stored in the new folder and has been removed from the original location. You can move files in bulk by using the Move Files to Folder mass update at Lists > Mass Update > Mass Updates.

Important: The Move Files action isn't available for files that have been installed from a bundle and are marked as locked in the bundle, or for files that are located in a folder that has been installed from a bundle and is marked as locked in the bundle. If you choose Move Files for a File Cabinet folder that includes any locked files, the Folder Contents page clears the box for these files and displays a lock icon for each one.

Copying Files

You can also copy files to other folders to store files in multiple folders.

To copy files:

1. To access the File Cabinet, go to Documents > Files > File Cabinet.
2. Go to the folder that contains the files you want to copy.
3. Click **Copy Files**.
4. Check the box next to each file you want to copy.
5. Under the **Filters** subtab, select **Copy To**. Then, select the folder where you want to save the copies.
6. When you've finished, click **Copy**.

The selected files are now saved in both the original folder and the new folder.

Downloading Files from the File Cabinet

You can download individual files or entire File Cabinet folders and their contents. If you don't have permission to view files in a certain folder, then you can't use the Download link to save files from that folder on to your computer. Note that the same restrictions applied to a File Cabinet folder also apply to the Download link.

To download a file or folder from the File Cabinet:

1. Click the **Documents** tab.
2. Go to the file or folder you want to download.
3. Click **Download** next to the file or folder.

When you download a folder, all of the files and subfolders are downloaded in a ZIP file to keep the folder structure. File names must include the file extension so that you can use the appropriate application to open your files after unpacking the downloaded ZIP from the File Cabinet.

Note: You should work with files of 100 MB or smaller. Note that various factors may affect the time it takes to upload and download files greater than 100 MB, such as network speed, time-out settings, and overall space limitations.

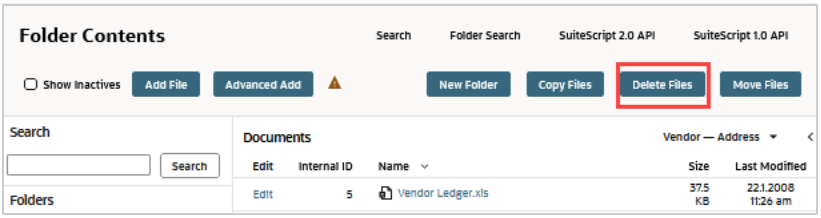
Deleting Files from the File Cabinet

You can delete files to help organize and clean your NetSuite File Cabinet. Only users with the Administrator role and users with the full Documents and Files permission can delete File Cabinet files. For more information, see the help topic Setting Permissions.

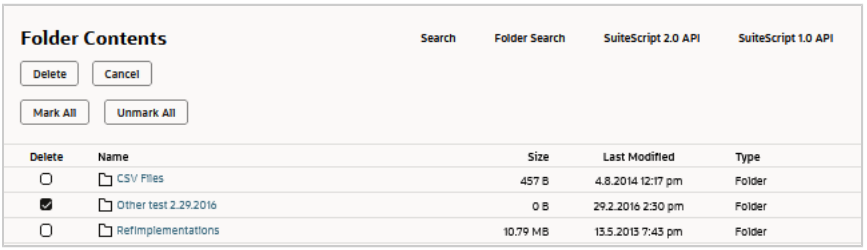
Important: The Move Files action isn't available for files that have been installed from a bundle and are marked as locked in the bundle, or for files that are located in a folder that has been installed from a bundle and is marked as locked in the bundle. If you choose Move Files for a File Cabinet folder that includes any locked files, the Folder Contents page clears the box for these files and displays a lock icon for each one.

To delete files:

1. Click the **Documents** tab.
2. Go to the folder that contains the files you want to delete.
3. Click **Delete Files**.



4. Check the box next to each file you want to delete.



5. Click **Delete**.

You can't delete files that are referenced by other records in NetSuite. Alternatively, you can inactivate files you no longer use.

The Mass Update functionality enables you to specify the criteria that define the files you want to delete. For more information about Mass Deletes, see the help topic Performing Mass Deletes.

File Types Recognized in the File Cabinet

You can upload any type of file to the File Cabinet. The Documents pane shows the file extension and lists the file type. The following file types are recognized in the NetSuite File Cabinet:

File Type	file name Extension
AppCache Manifest File	.appcache
AutoCad	.dwg, .dwf, .dxf, .dwt, .plt
BMP Image	.bmp
Certificate File	.cer, .crl, .crt, .csr, .der, .key, .p10, .p12, .p7b, .p7c, .p7r, .p8, .pem, .pfx, .spc
CFF File	.cff
Compressed Tar File	.tgz, .tbz

File Type	file name Extension
Configuration File	.config
CSS File	.css
CSV File	.csv
EOT File	.eot
Excel File	.xls, .xlsx
Flash Animation	.swf
FreeMarker Template File	.ftl
GIF Image	.gif
GNU Zip File	.gz
HTML File	.html, .htm, .shtml
Icon Image	.ico, .icon
Image	.jpg, .jpeg, .pjpeg, .gif, .png, .bmp
JavaScript File	.js, .json
JPEG Image	.jpg, .jpeg
JSON Response	
LZH File	.lzh, .lha
Message RFC	.eml
MP3 Audio	.mp3
MPEG Video	.mpg, .mpeg
OTF File	.otf
Other Binary File	.bin
PDF File	.pdf
PJPEG Image	.pjpeg
Plain Text File	.txt, .prn
PNG Image	.png
PostScript File	.ps, .eps
PowerPoint File	.ppt, .pptx
Project File	.mpp
QuickTime Video	.mov
RTF File	.rtf
SMS File	.sms
SuiteScript File	.ss

File Type	file name Extension
SuiteScript Page	.ssp
SVG Image	.svg
Tar File	.tar
Text File	.txt, .css, .htm, .html, .xml, .htc, .sql, .csv, .log
TIFF Image	.tiff, .tif
TTF File	.ttf
Visio File	.vsd
WOFF File	.woff
WOFF2 File	.woff2
Word File	.doc, .dot, .docx
XML File	.xml
XSD File	.xsd
Zip File	.zip

Unrecognized File Types

NetSuite accepts all file formats in the File Cabinet, but if it doesn't recognize a file format, it lists the file type as **Other Binary File**. NetSuite can't identify unrecognized file formats if you upload them in a .zip file. If you see other binary files in a folder, but want to ensure that the file extension displays, then upload those files one at a time.

Exporting Reports, Searches, and Lists

You can export reports, searches and lists into various formats. Exporting provides you with more flexibility to review and analyze your business's data.

For information about exporting, see the following sections.

- Exporting a Report
- Exporting Search Results
- Exporting Lists

Comparing Export Formats

Each export format has its own advantages and limitations, listed below:

- Exporting to Word
- Exporting to PDF
- Exporting to Excel
- Exporting to CSV
- Exporting to Tableau

Exporting to Word

- **Supported Versions** – Reports are exported in Word 97 - 2003 format.
- **Expand/collapse** – Settings are maintained. The report will be displayed as it is currently viewed on the screen. If you have collapsed a section of the report (hiding some rows), then those rows won't be available in the word document. You won't be able to expand and view hidden rows.
- **Company Logo** – The logo will display in the exported Word report if you've set it as a preference in the Analytics subtab at Home > Set Preferences.

Exporting to PDF

- **Expand/collapse** – Settings are maintained. The report will be displayed as it is currently viewed on the screen. If you have collapsed a section of the report (hiding some rows), then those rows won't be available in the word document. You won't be able to expand and view hidden rows.
- **Company Logo** – The logo will display in the exported Word report if you've set it as a preference in the Analytics subtab at Home > Set Preferences. However, the uploaded image is not resized to fit the PDF layout, it's used as is.
- **Formatting** – By default, a PDF of an exported report/search has a font size of 8 and a portrait orientation. You can change these settings by updating the PDF Page Orientation and PDF Font Size preferences on the Analytics subtab at Home > Set Preferences. See the help topic Setting Formats for Reports Exported to PDF.
- **Size Limitations** – Exported PDFs currently have some output limitations. You may encounter issues if your report results include a large number of rows or columns, or extremely long field values. You can't export reports with more than 30 columns and NetSuite limits records for reports with more

than 10 columns. To get around these issues, try adding criteria to reduce the number of rows and columns, or remove fields with long values. For details, see Limitations on Exports to PDF.

Exporting to Excel

- **Supported Versions** - Only XLS files are supported. XLSX files aren't supported.
- **Expand/collapse** - Settings aren't maintained. All rows in the report will be exported, any collapsed rows will appear fully expanded in Excel.
- **Company Logo** – The company logo is not displayed in Excel exports, even if you've enabled the Print Company Logo option on the Analytics subtab at Home > Set Preferences.
- **Unicode** – Supported.
- **Decimal precision** – Excel keeps the same high decimal precision you see in the report or search.
- **Limitations** – For item records with the Detailed Description field, the length of this field is limited to 1,300 characters in search results.

Exporting to CSV

- **Expand/collapse** – Settings aren't maintained. All rows in the report will be exported, any collapsed rows will appear fully expanded in Excel.
- **Company Logo** – The company logo isn't exported.
- **Unicode** – Not supported.
- **Decimal precision** – All decimal numbers are limited to 2 decimal places. If you need more precision, you should export to Excel first, then save it as a CSV file.
- **Handling Special Characters** – If you open a CSV file in Excel that has data in languages other than English, some special characters may not show correctly. If that happens, export to Excel instead, then save it as a CSV file. For more information, see Limitations on CSV Exports of Data with Special Characters.

Exporting to Tableau

- **Supported Versions** – Tableau Desktop 8.3 or later.
- **Expand/collapse** – Settings aren't maintained. All rows included in the report or search results will be exported.
- **Company Logo** – The company logo is not displayed when the report or search is exported as a Tableau workbook.
- **Unicode** – Supported.
- **Decimal precision** – Tableau Desktop keeps the same precision you see in each report or search.
- **Limitations** – Sort settings may not be kept when you export search or report results as a Tableau workbook.

See the following topics for export limitations:

- Limitations on Exports to PDF
- Limitations on CSV Exports of Data with Special Characters

Limitations on Exports to PDF

Exported PDFs have some limitations. If your export has more than 10,000 rows, exporting to PDF could cause an error. Also, if your export has a lot of columns or long field values, you may see formatting issues.

To avoid performance problems, don't export more than 30 columns. If you export more than 10 columns, the number of rows is limited, as shown in the table below:

Number of Columns in PDF Export	PDF Export Row Limit
1-9 columns	3000 rows
10-20 columns	2000 rows
21-30 columns	1000 rows
more than 30 columns	not supported

All PDFs you export are checked against the BFO document type definition (DTD). BFO is a a set of third-party libraries for generating PDF documents. The BFO documentation is available at http://bfo.com/products/report/docs/userguide.pdf.

Limitations on CSV Exports of Data with Special Characters

If you export data in a language other than English to a CSV and open it in Excel, some special characters may not show correctly.

Exported CSV files are plain text and don't include any BOM (byte order marker) for encoding information. These files use UTF-8 encoding, but without a BOM, Excel uses a different encoding, so special (non-ASCII) characters may not show correctly.

This doesn't happen when you open an exported XLS file in Excel, or when you open a CSV in Notepad or another text editor.

To avoid this issue:

1. Export your data to Excel instead of CSV.
2. Open the file in Excel.
3. Save the file as a CSV if you want.

   Note that Excel adds a BOM character to the start of the CSV file.